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Because Software Should Be Simple!

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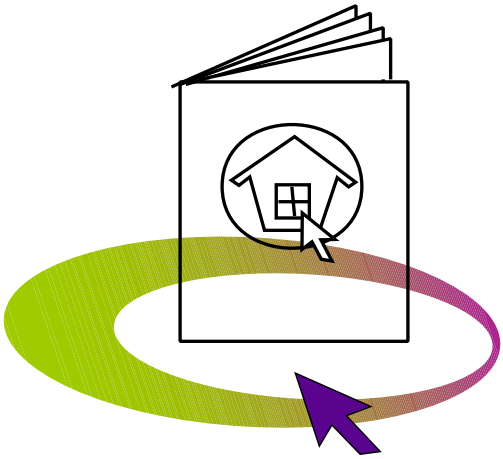
WinTen Custom Report Writer



10/8/2003 Edition

For Program Version 10/8/2003

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WinTen Custom Report Writer User Manual

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Any references to company, housing authority, or individual names or identities in examples or screen images are for demonstration purposes only and are not intended to refer to any actual organization or person.

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Introduction

The WinTen Custom Report Writer program is a data management program designed for use on computers running the Windows 95, 98, ME, NT, 2000, or XP operating system. The interface is designed for use in a Windows environment and includes point-and-click mouse actions, pull-down menus, and Windows-based help functions. This manual contains all of the information you need to use the WinTen Custom Report Writer program (hereafter referred to as Custom Report Writer, Report Writer, or CRW).

Version Information

This manual is written for the initial mass release of Report Writer. It does not apply to previous versions of the program (including MS-DOS-based ones) and some sections may be inaccurate with regards to later versions.

Whenever Tenmast issues an update to this program, we will notify your agency through email. If you have a current Update & Support Agreement for this program, you may download and install the update through the Tenmast Update Manager program. During the download and installation process, Update Manager will notify you of the changes to the program.

We periodically update this manual to reflect significant changes to the program. You may download this updated documentation from our Web site at no charge.

Getting Help

Though we have made every effort to make this manual as comprehensive as possible, no document can cover all contingencies. If you encounter problems with Report Writer, call the Tenmast Training & Support Department toll-free at (877) 359-5492 or send email to support@tenmast.com.

Revisions

To better serve our clients, we constantly update our manuals, just as we constantly make improvements in our programs. If you find an error or omission in this documentation or have a suggestion for improving it, call the Tenmast Marketing/Communication Services Department toll-free at (877) 836-6278 or send email to info@tenmast.com.

Hint: Downloading Manuals

You can find the current version of this manual in the Client Service Area of our Web site at http://www.tenmast.com. All manuals are available in PDF file format. You must have version 4.0 or newer of Adobe Acrobat Reader to open and print manuals. You can also order printed copies of the manual through our Marketing/Communication Services Department.

Program Overview

The WinTen Custom Report Writer program is a data reporting utility designed for use with all of the WinTen programs. It enables you to generate reports from any database in your WinTen system, or a combination of related databases. With the Report Builder functions included in the program, you also can edit reports' layouts. The program's internal management functions enable you to assign a report to a report group, which is a security group to which one or more users can have access.

Report Writer Terminology

This manual uses some terms that are specific to Report Writer and may be new to you:

Calculation
In Report Writer, a calculation is a mathematical equation used to create a new data field from existing data fields. This is an advanced report creation feature.

Calculation Example: *You want a data field on a report that shows the total number of elderly and child members in each household. This number is not in the database. However, you can set up a calculation that adds the number of elderly members of a household and the number of child members of a household.*

Data Source
A data source is the selected data from one or more WinTen databases from which a template (see below) generates reports. Data sources are set up by Tenmast during program installation.

Filtering
Filtering is a method of selecting specific items from a data source that match one or more criteria.

Filtering Example: *You can filter a report so that only tenants with annual household incomes under $15,000 appear on it.*

Grouping
Grouping is a method of organizing a report around groups of records that have something in common. Each group will receive its own sub-header, which is the element that the records in the group have in common.

Grouping Example: *If you have a report that lists tenants and addresses, you can group the report by zip code. All tenants with a zip code of 40507 will be listed together under a "40507" header, followed by all tenants with a zip code of 40508 and so on.*

You can also set sub-groups within a group. If you sub-grouped the above report by bedroom size, your report would list all tenants with 0-bedroom units in zip code 40507, then all tenants with 1-bedroom units in zip code 40507, and so on.

Logical Statement
A logical statement is a mathematical equation that either includes or excludes a record on a report, depending on the value of one of the pieces of data in that record. Logical statements use standard algebraic symbols such as = (equal to), < (less than), and > (greater than). They are most often used to filter the data that will appear on a report.

Logical Statement Example: *When used to filter the data used on a report, the logical statement "Total Tenant Payment > 200" will include all tenant records that have Total Tenant Payment values greater than $200, and exclude all tenant records that have Total Tenant Payment values less than or equal to $200.*

Report Template
A report template is a data record that contains all of the setup information for one report. It is the electronic equivalent of a blank master copy of a form that you can photocopy and fill in whenever you run the report. When you use the "Add Report" function of Report Writer, you are actually creating a report template.

User-Defined Filter
Normally, when you set a report filter (see above), you set the filter to always include or exclude the same set of records. You can also set a filter to ask the user which records he wants to include or exclude whenever he runs the report. This is a user-defined filter rather than a standard filter. User-defined filters are an advanced report creation feature.

User-Defined Filter Example: *You can add a user-defined filter to a report so that only tenants with annual household incomes under a certain amount appear on it. Whenever a user runs the report, he specifies that amount for the copy of the report he is running.*

Main Menu

The Main Menu is the starting point for using each function of the Report Writer program. When you start Report Writer, this screen opens immediately after you log into the program.

Setup

The first time you run Report Writer, the first option you should select from the Main Menu is Setup. All WinTen programs have Setup functions. The settings in the Setup screen control the program environment, and you can change many aspects of the program's operation through these settings. Be careful to enter the proper information, as inaccurate settings can cause Report Writer to function in an unexpected manner.

The individual in charge of your WinTen programs should periodically review each program's Setup to ensure that it is still correct. Access to the Setup screen should be restricted through the Tenmast Security program after the initial settings have been entered in order to prevent accidental changes to the settings.

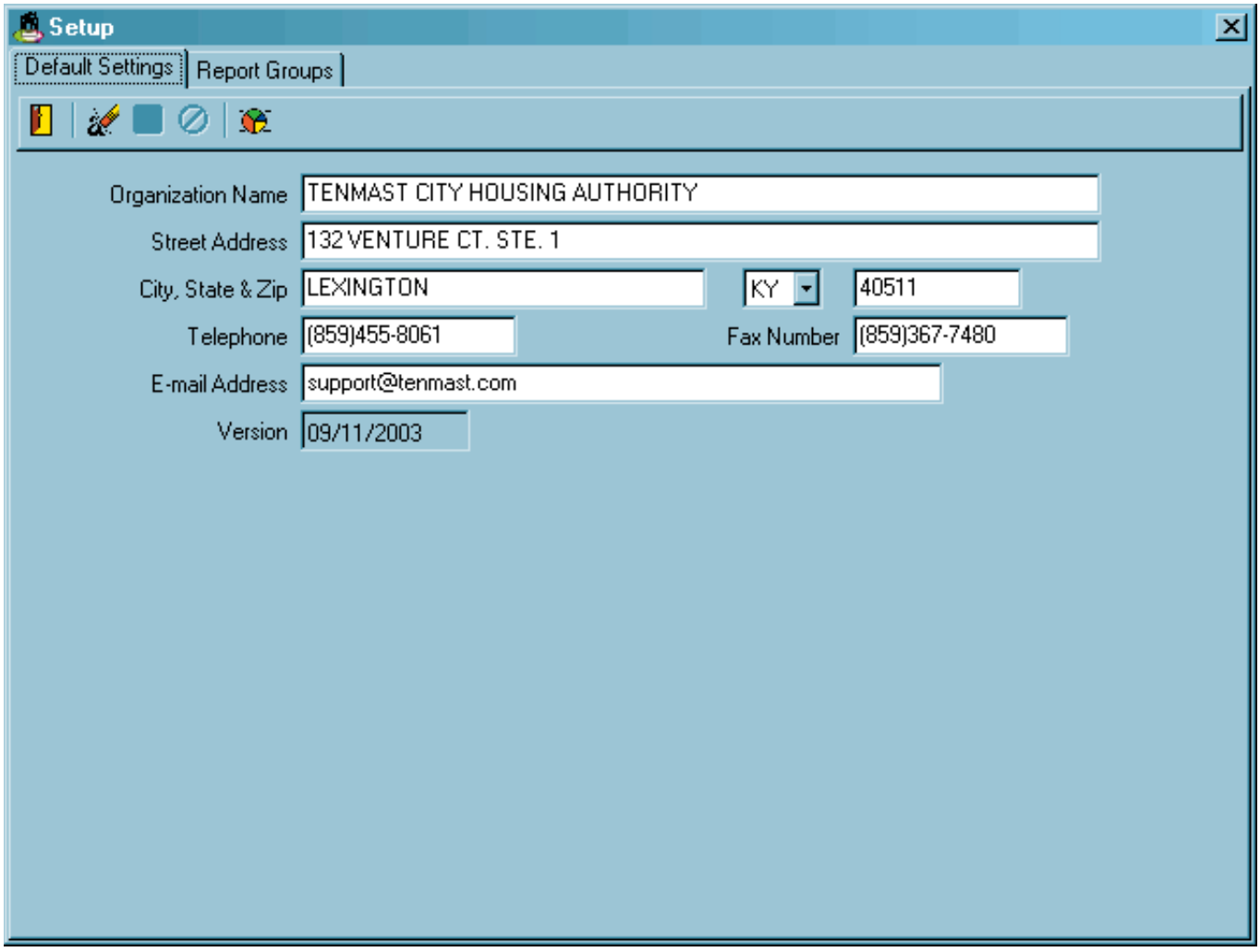
To use the Setup functions, click the Setup button or press <S> at the Main Menu.

Setup Screen

The Setup screen has two tabs: Default Settings and Report Groups. It always opens on the Default Settings tab, as shown below.

Default Settings Tab

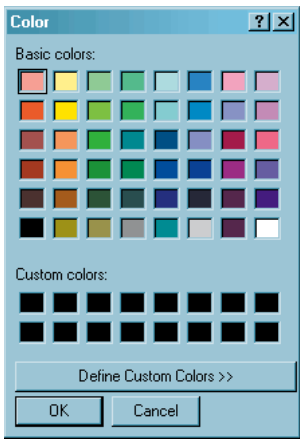
The Default Settings tab contains your agency's identifying information. Use the standard WinTen controls to edit the data on this tab and save or cancel your changes.



Default Settings Tab Controls

Color Button
The Color button opens the Color dialog box. Click on a color to set the background color of the Report Writer screens to that color.

Some parts of some screens may remain unchanged so they remain readable.



Hint: Color Settings

A color setting, like any other setting, is only applied to the current data area. Many agencies use this feature to color-code their data areas so users can tell at a glance what data area they're currently using.

Default Settings Tab Data Fields

Organization Name
This is your agency's name.

Street Address
This is your agency's street address.

City, State & Zip
These three fields are your agency's city, state, and zip code.

Telephone
This is your agency's phone number.

Fax
This is your agency's fax number.

E-mail Address
This is your agency's email address.

Version
This is the current version of Report Writer that you are running. You cannot edit this field – the program automatically displays its version date.

Report Groups Tab

The Report Groups tab enables you to set up report groups. Report groups are administrative tools that gather similar reports together for use by specific authorized users. This tab has two sub-tabs: Groups and Members. It always opens on the Groups sub-tab, as shown below.

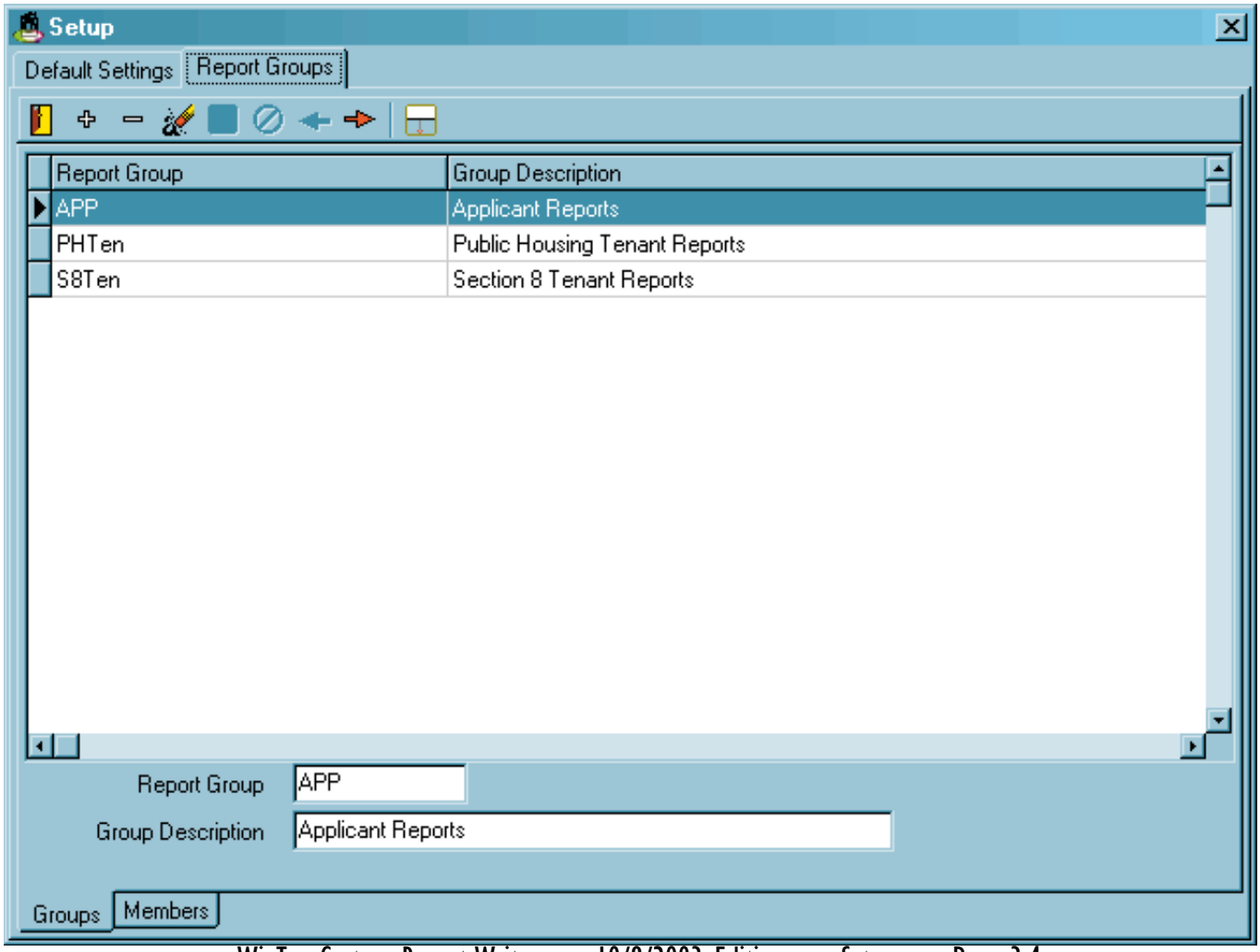
Groups Sub-Tab

The Groups sub-tab contains a table of all report groups in Report Writer. Use the standard WinTen controls to add, delete, or edit report group records and save or cancel your changes.

Groups Sub-Tab Data Fields

Report Group
This is a unique identifying code for the report group.

Group Description
This is a short (40-character) description for the report group. This is the description that the program provides when a user is selecting a report group during report creation or processing.



Members Sub-Tab

The Members sub-tab enables you to set the users who are authorized to edit and use the reports in the selected report group. The left side of the screen contains the list of all users who do not have access to the group, and the right side of the screen contains the list of all users who do have access to the group.

To grant a user access, select that user on the left side of the screen and click the [>>] button. To revoke a user's access, select that user on the right side of the screen and click the [<<] button.

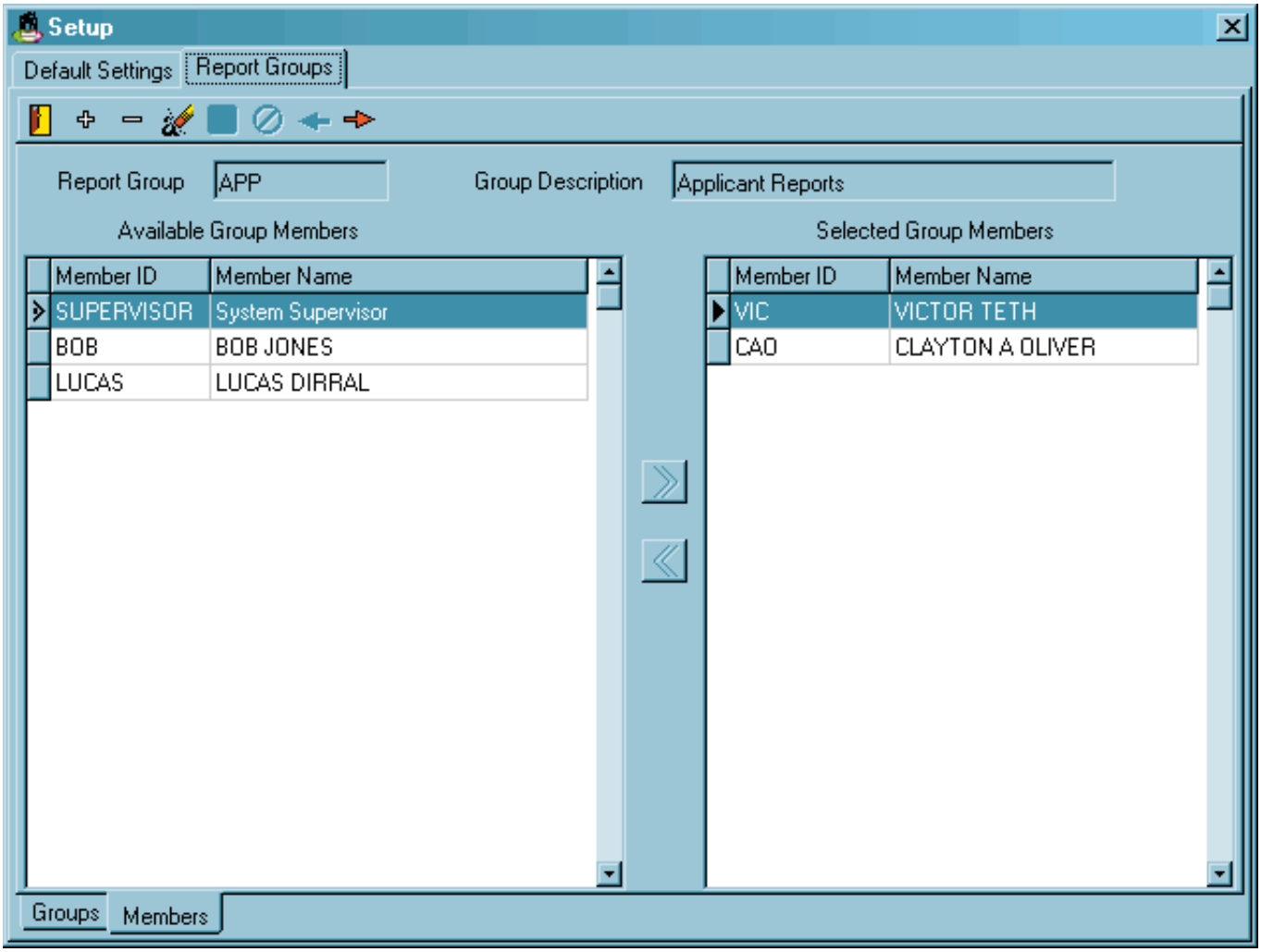
Any user can have access to any or all report groups.

Caution

The report group membership features work only if you use WinTen security. If security is not enabled, report group membership will have no effect and you will be unable to restrict access to any report group.

Hint: Where do these users come from?

The users on the Members sub-tab are drawn from the list of users in the WinTen Master Setup program. If you need to add a new user, you must do it in that program's security setup area.



Adding a New Report Template

The core purpose of Report Writer is to enable you to create new reports and run them as needed. This chapter addresses the basic procedure for creating a report template. The next chapter, Advanced Report Creation, details the advanced options that are available to you.

Before you start building your report template, you should have a solid idea of what you want on the report. Go through the WinTen programs that contain the data you want on the report and write down the specific data fields that you want to include. Spend a few minutes thinking about what you want the report to look like. Should it be sorted by zip code or grouped by number of dependents in a household? Does it need to subtotal each applicant's total household income? Write down any specific ideas you have about what you want the report to look like - this will help you choose the correct steps when you are building it.

Hint: Report vs. Report Template

A report template is a "blank" report. Think of the template as a freshly-photocopied form with a lot of empty spaces on it. When you run a report, the program "fills out" a copy of this form and gives it back to you with all of the blank spaces filled in. This chapter deals with the process by which you can create a new "blank form."

When you are ready to start building your report template in Report Writer, click the Add Report button or press <A> at the Main Menu. This starts the Create New Report wizard.

Create New Report Wizard

The Create New Report wizard controls the process for creating a new report template.

Step One

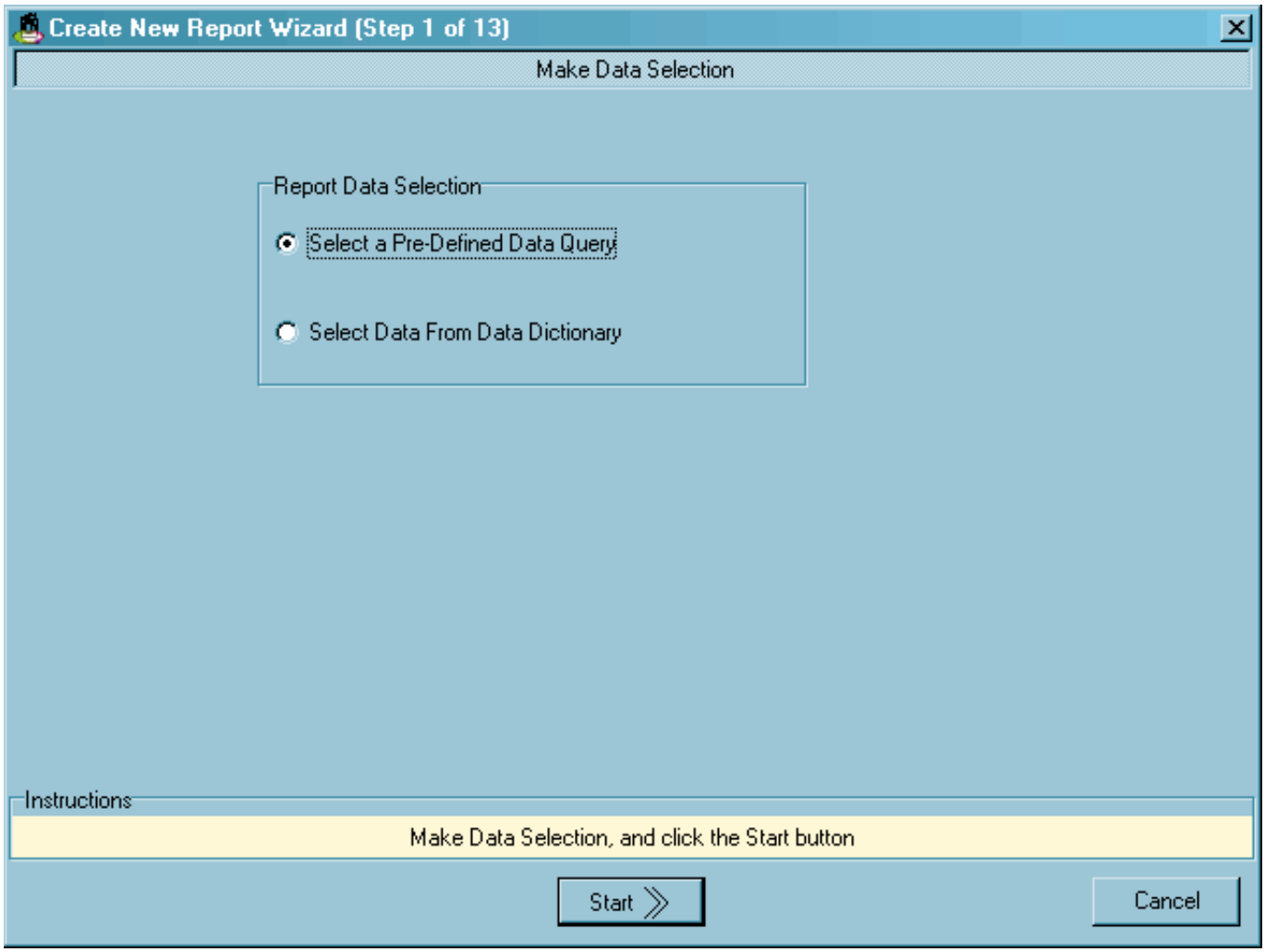
In Step One, select the source you will use for the new report template's data. Select the "Pre-Defined Data Source" option to use one of the pre-defined data sources included with the program. Click the Start button to proceed to Step Two.

Hint: Advanced Users

Advanced users can select the "Data Dictionary" option. This enables you to choose specific WinTen database files from which to draw data for the report template. For details on this option, see the Advanced Report Creation chapter.

Hint: What is a pre-designed data source?

A pre-defined data source is a set of data fields from one Tenmast program, grouped togther to enable you to generate reports on one specific topic or type of data.



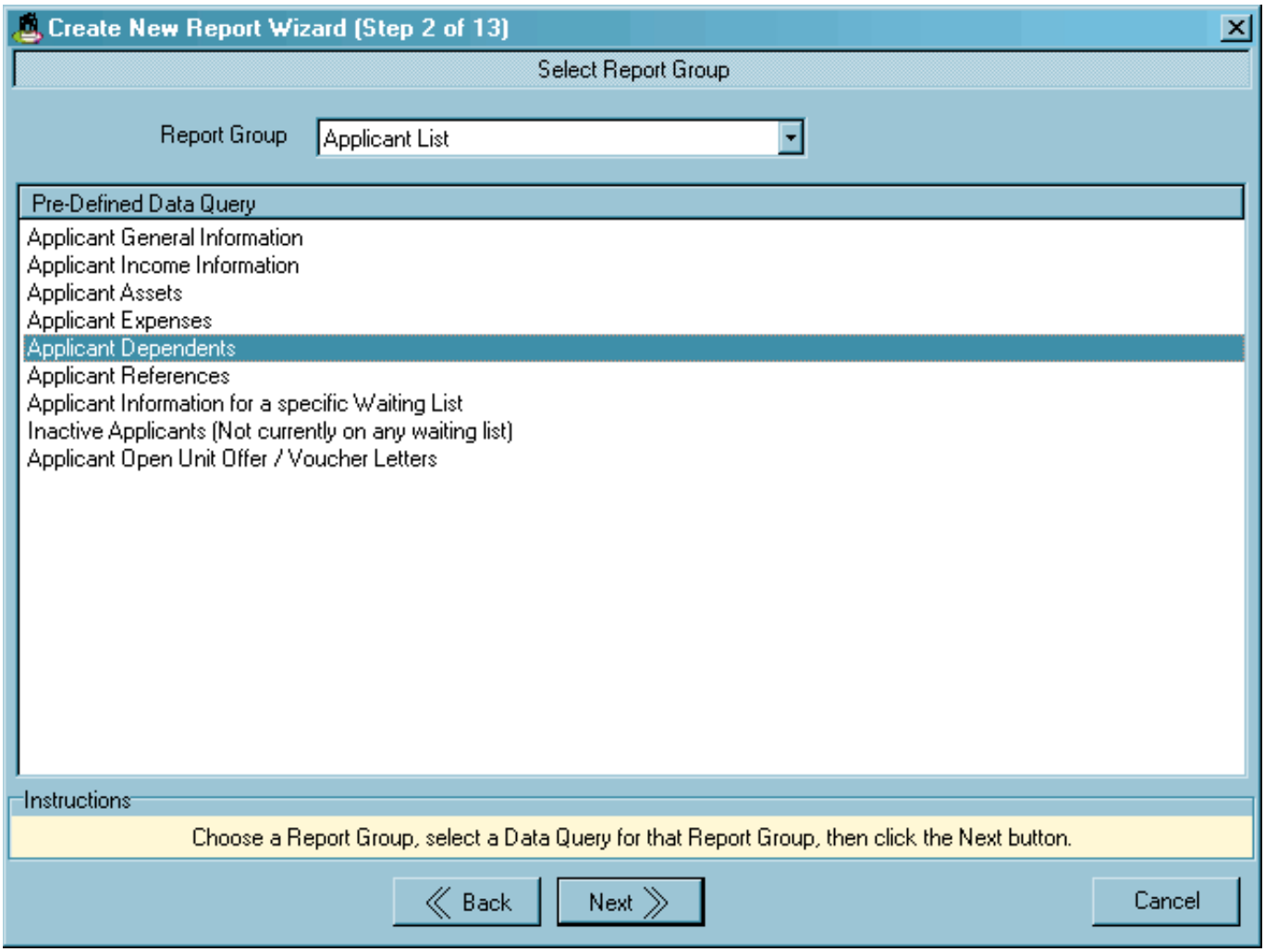
Step Two

In Step Two, use the Report Group drop-down selection box to select the general type of WinTen data to use for the report template. The table of data sources changes to match the selected report group.

Select the data source you want to use for the report template, then click Next. The program skips Step Three and proceeds to Step Four.

Hint: Advanced Users

If you selected the "Data Dictionary" option in Step One, the program skips Step Two and proceeds to Step Three, where you can select individual database files to use in the report template. For details on Step Three, see the Advanced Report Creation chapter.



Step Four

In Step Four, select the data fields you want to include in the report template. The left side of the screen contains a list of every data field that is in the selected data source. The right side of the screen contains a list of every data field that is included in the report template.

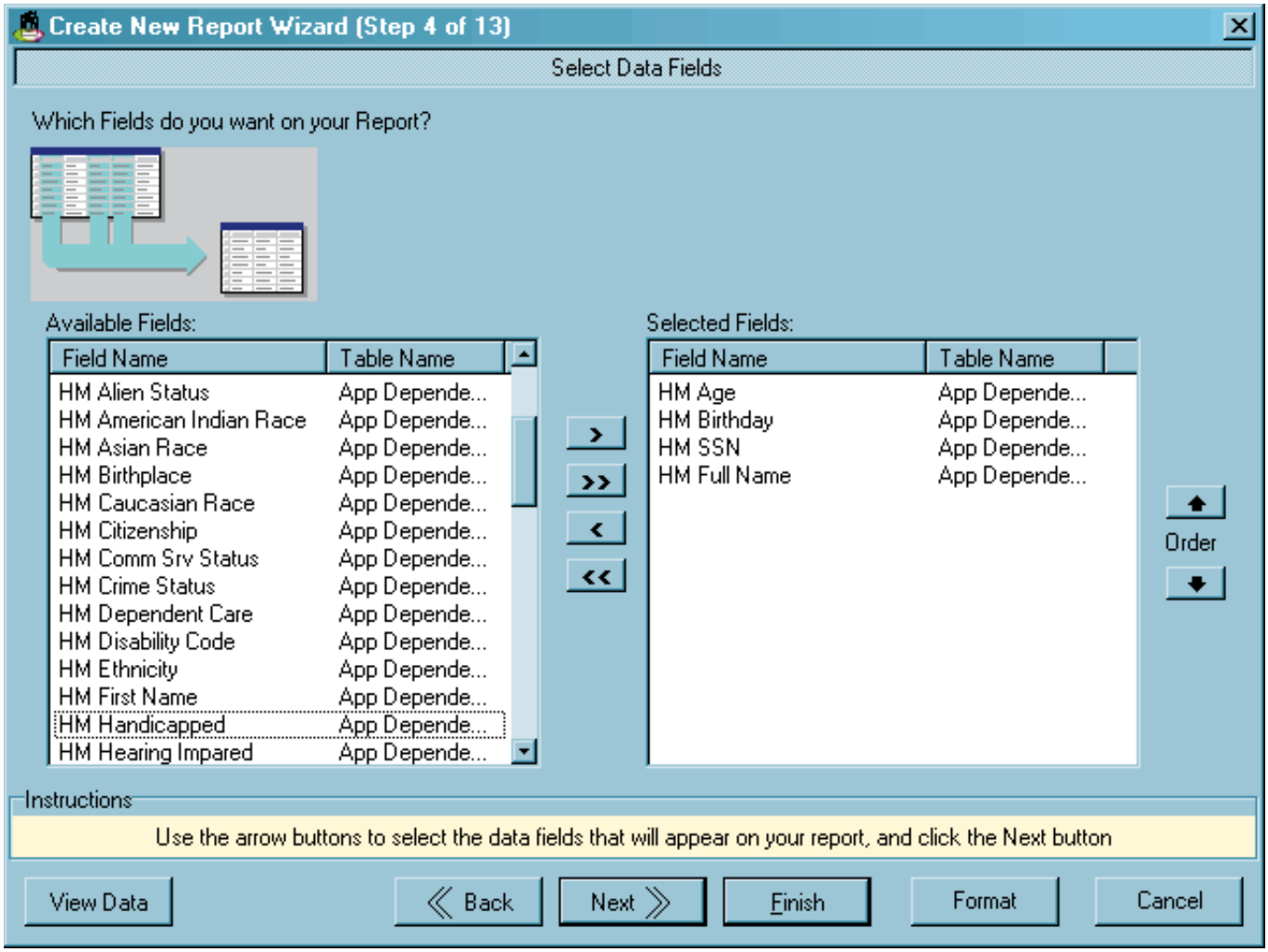
To add a data field to the report template, select it and click the [>] button. To remove a data field from the report template, select it and click the [<] button.

To change the order in which a data field will appear on the report, select it in the Selected Fields table and click the up-arrow or down-arrow buttons on the right side of the screen to change its position in the table.

When you have selected the data fields you want on the report template, click Next to proceed to Step Five.

Hint: "View Results"

At Step Four or any subsequent step, you can click the View Result button in the lower left corner of the wizard to open the SQL Preview sub-screen. This sub-screen displays a table of all of the data that will appear on the report if you create the report template with your current selections.



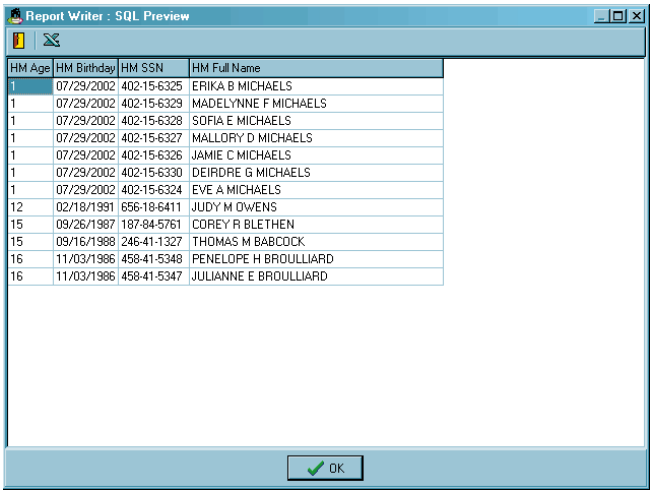
But I'm Done Now!

At Step Four or any step thereafter, you have the option to ignore the rest of the report creation options available to you and say "no more, this is all the information I need, I'm done now." If you don't need any of the report options presented in the rest of the wizard, you can click the Finish button to skip straight to to Step Fourteen. The net result is as if you'd just clicked the Next button at every subsequent step.

If you don't want to do anything else with the report's data but you do want to change the default formatting, you can instead click the Format button to skip straight to Step Thirteen.

But What Will It Look Like?

Also, starting at Step Four, you can preview the data that will be included on the report you're creating if you complete the process right now. Click the View Data button. The SQL Preview sub-screen opens. This sub-screen provides a simple "spreadsheet" view of the report's data.


Report Writer : SQL Preview
HM Age
HM Birthday
HM SSN
HM Full Name
1 07/29/2002 402-15-6325 ERIKA B MICHAELS
1 07/29/2002 402-15-6329 MADELYNNE F MICHAELS
1 07/29/2002 402-15-6328 SOFIA E MICHAELS
1 07/29/2002 402-15-6327 MALLORY D MICHAELS
1 07/29/2002 402-15-6326 JAMIE C MICHAELS
1 07/29/2002 402-15-6330 DEIRDRE G MICHAELS
1 07/29/2002 402-15-6324 EVE A MICHAELS
12 02/18/1991 656-18-6411 JUDY M OWENS
15 09/26/1987 187-84-5761 COREY R BLETHEN
15 09/16/1988 246-41-1327 THOMAS M BABCOCK
16 11/03/1986 458-41-5348 PENELOPE H BROULLIARD
16 11/03/1986 458-41-5347 JULIANNE E BROULLIARD
OK

If you like what you see, click the Export to Excel button to open a standard Windows file save dialog box and save the data as a Microsoft Excel (.XLS) file.

Step Five

In Step Five, select any grouping that you want to apply to the report template. The default setting is to treat all data fields equally. You can select one or more fields to use as primary and secondary groups (report headers). The preview image on the right side of the screen shows your current grouping scheme. You can have a maximum of three grouping levels in a report.

If you add a group, you have two additional options on this step:

If you want to print the total number of records in each group at the end of that group, check the Print Record Count on Group Footer box.

If you want to separate the groups with horizontal lines, check the Print Line Separating Groups box.

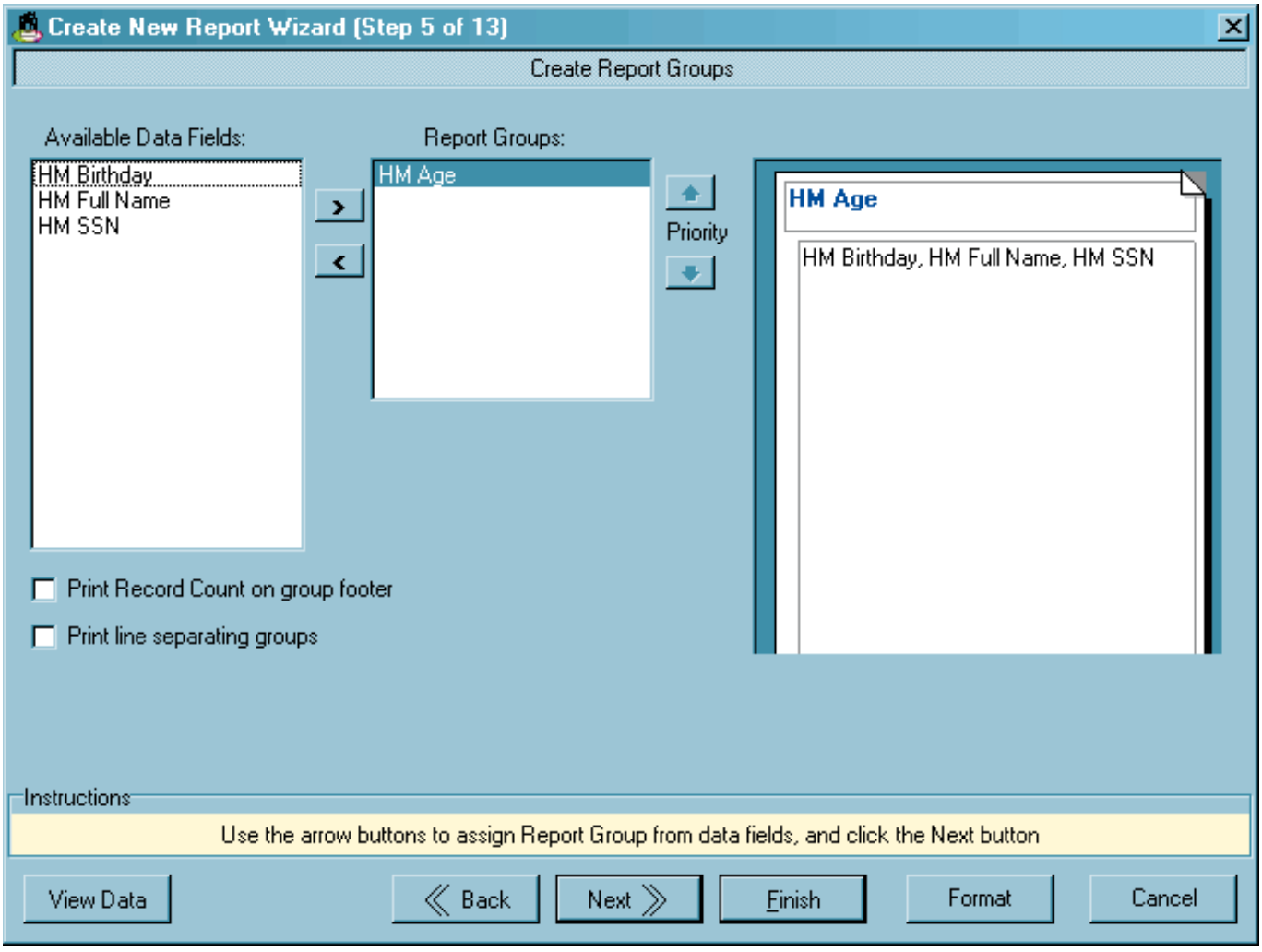
When you have set up the grouping scheme for the report template, click Next to proceed to Step Six.

Hint: Grouping

• To designate a data field as a group header, select it in the Available Fields table and click the [>] button. When you add a new group, the preview image at the right side of the screen changes to reflect your new choice.

• To remove a field from group header status and return it to being displayed as standard data, select it in the Group Fields column and click the [<] button.

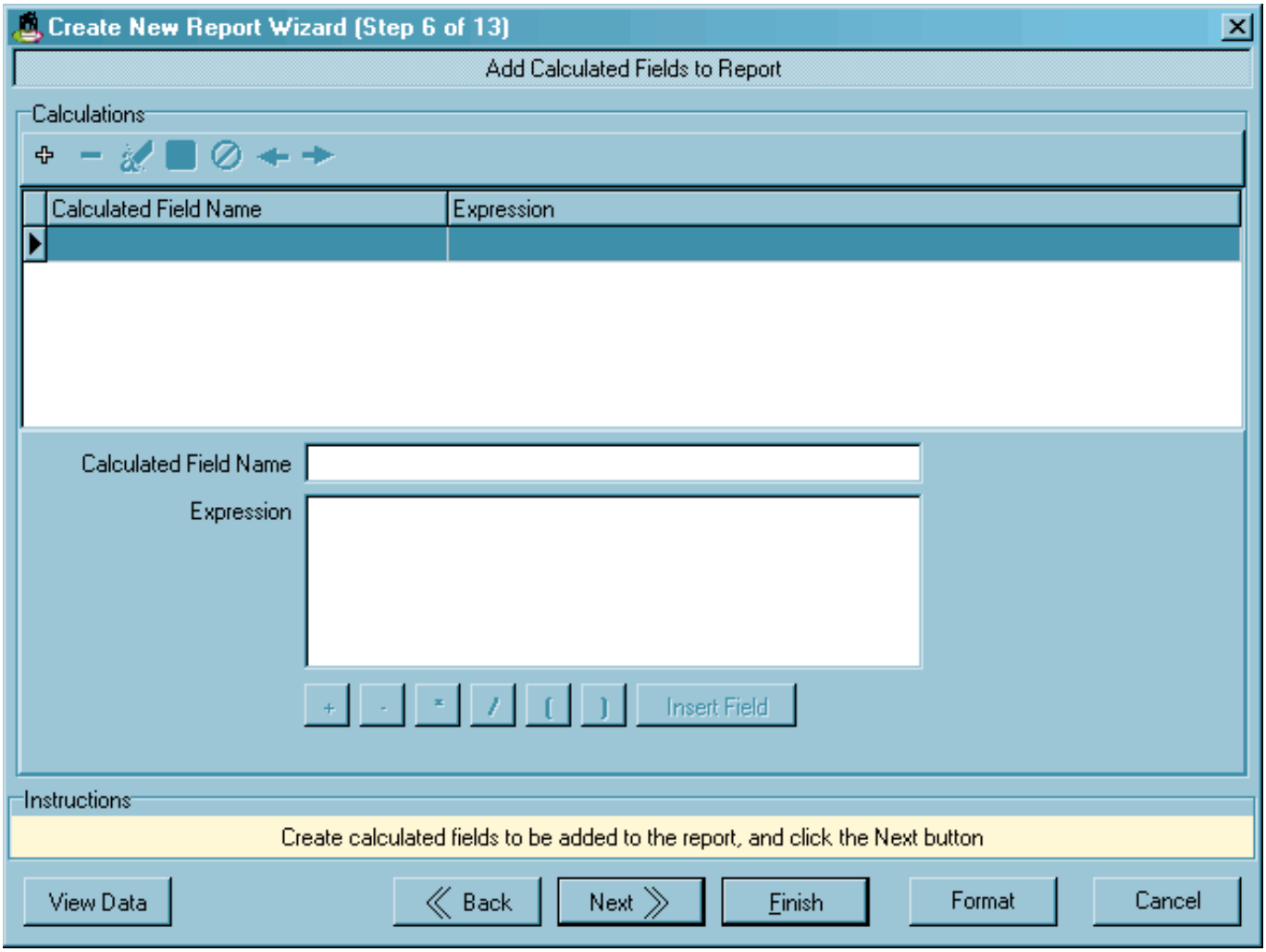
• To change the priority of a group header (e.g. make a secondary header into a primary one or vice versa), select it in the Group Fields column and click the up- or down-arrow Priority buttons.



Step Six

Step Six of the wizard allows you to add calculated data fields to the report. This advanced topic is examined in the next chapter.

Click Next to proceed to Step Seven (if you have included one or more data fields that can have numerical totals) or Step Eight (if you have not).



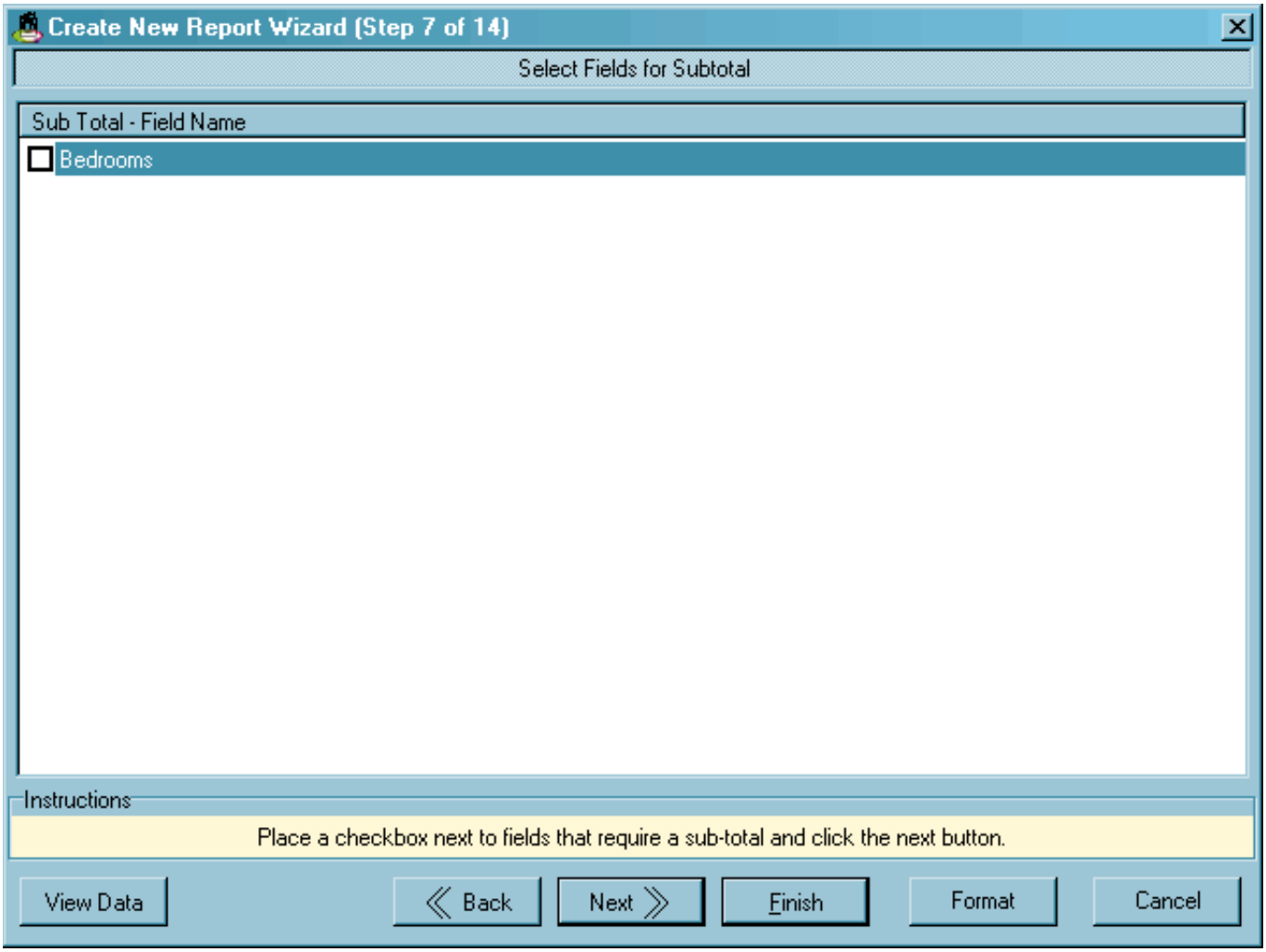
Step Seven

Step Seven only appears if you have selected one or more data fields with numerical values. In Step Seven, select any of these numerical data fields that you want to appear on the report template as subtotal lines and to be totaled in the report footer.

Check the box next to each field that you want to subtotal on the report template. When you are done, click Next to proceed to Step Eight.

Hint: Groups and Totals

If you added groups to the report in Step Five and you select one or more fields on which to total, each selected field will have a subtotal at the bottom of each group and a grand total at the end of the report. If your report has no groups, only the grand total line will appear.



Step Eight

In Step Eight, set the filtering option you want to use for the report template.

Select the field on which you want to filter the report. Use the Operator and Value fields to set the logical statement for filtering (e.g. "greater than 500" or "equal to LEXINGTON").

When you have set up the filter, click Next to proceed to Step Nine.

Hint: Advanced Users

Advanced users can select the "Advanced" option. This enables you to set multiple filtering options using logical equivalency statements. For details on this option, see the Advanced Report Creation chapter.

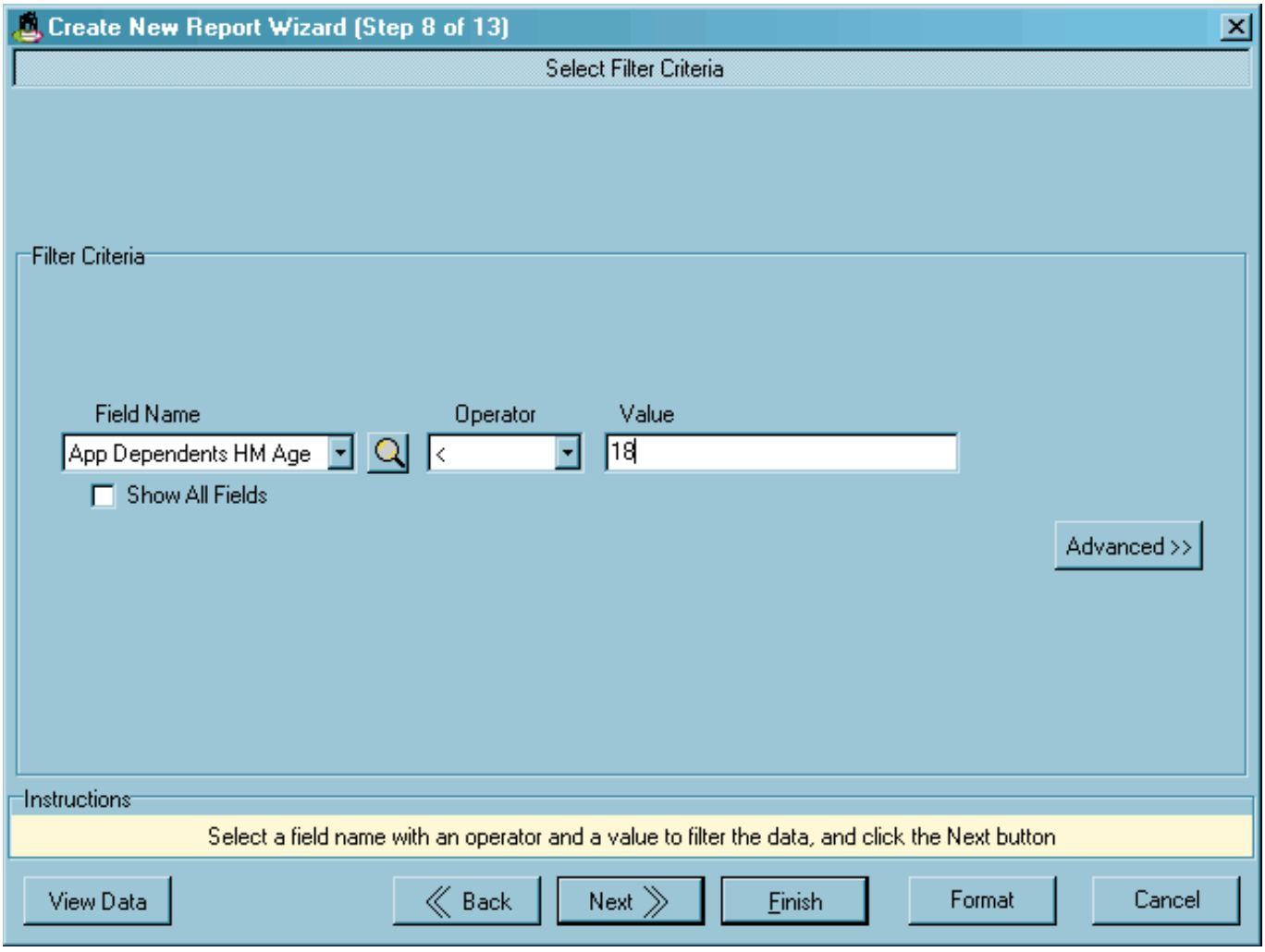
Hint: Between

If you use a "between" filter, separate the two values with a comma. For example, if you want all tenants between ages 30 and 40, enter "30,40" in the Value field.

Hint: "View Results"

Remember, at Step Four or any subsequent step, you can click the View Result button in the lower left corner of the wizard to open the SQL Preview sub-screen. This sub-screen displays a table of all of the data that will appear on the report if you create the report template with your current selections.

This feature is particularly important in Step Eight, because it enables you to check the data you will receive with your current filter selection, which can tell you if your filters are too restrictive or not restrictive enough.



Step Nine

In Step Nine, set the sorting options you want to use for the report template.

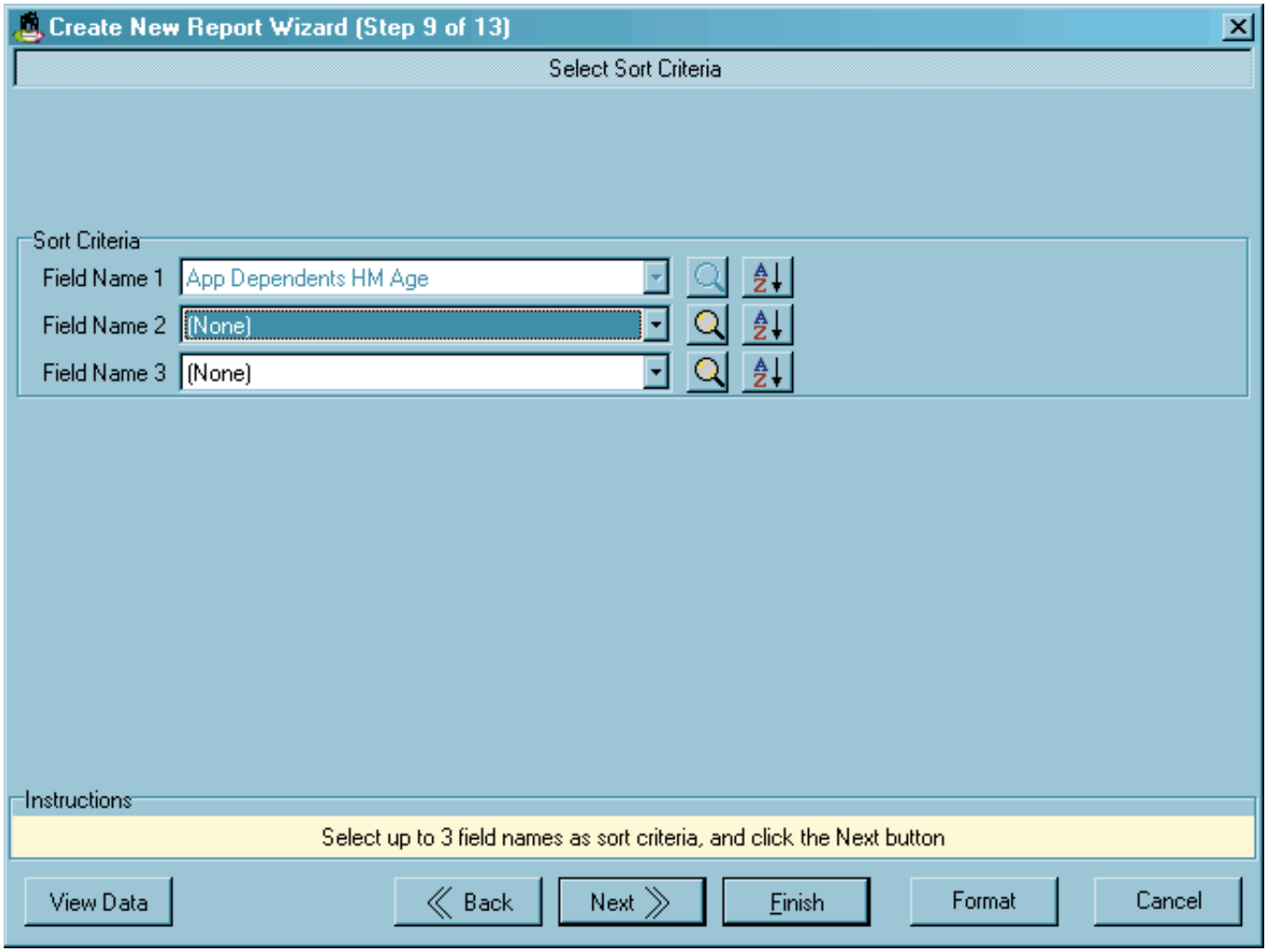
Use the drop-down selection boxes to set the fields by which you want to sort.

If you want a field to be sorted high-to-low (Z to A) instead of low-to-high (A to Z), click the A-Z button next to it. The button changes to a Z-A button, indicating that the field is in reverse sort mode. Click it again to turn off reverse sorting for that field.

When you have set the sorting options, click Next to proceed to Step Eleven (if you set up grouping in Step Five) or Step Ten (if you did not).

Hint: Default Sort Order

If you selected any data fields for grouping in Step Five, these will be the default sort fields in Step Eight.



Step Ten

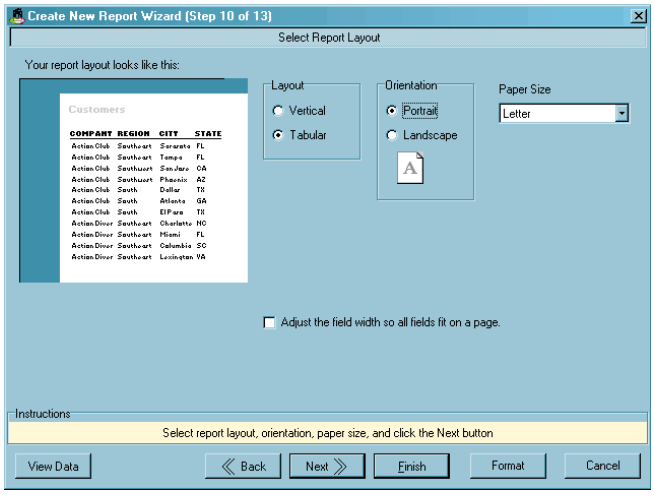
In Step Ten, select the layout scheme you want the report template to have.

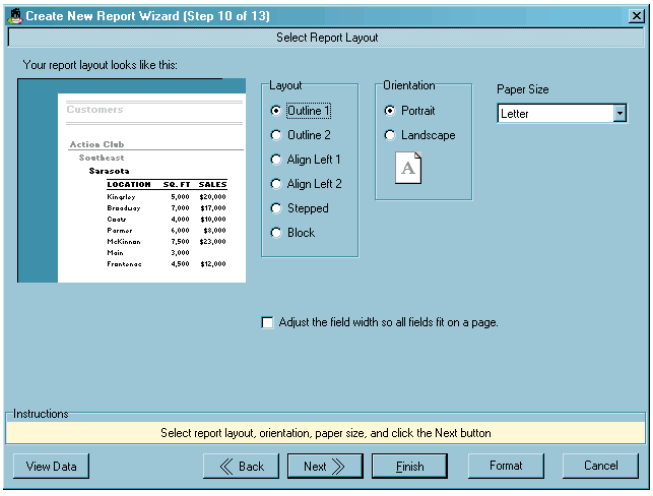
Use the Layout set of radio buttons to choose an organizational scheme and the Orientation pair of radio buttons to specify landscape or portrait orientation. The image at the left side of the screen changes to display a sample preview of your selected scheme. Your Layout options change depending on whether or not you selected grouping for your report in Step Five.

Use the Paper Size drop-down selection box to select the paper size for which the report will be formatted.

If you want the program to adjust data field widths automatically to fit all fields on a single page width, check the appropriate box.

When you have set the layout options, click Next to proceed to Step Twelve.



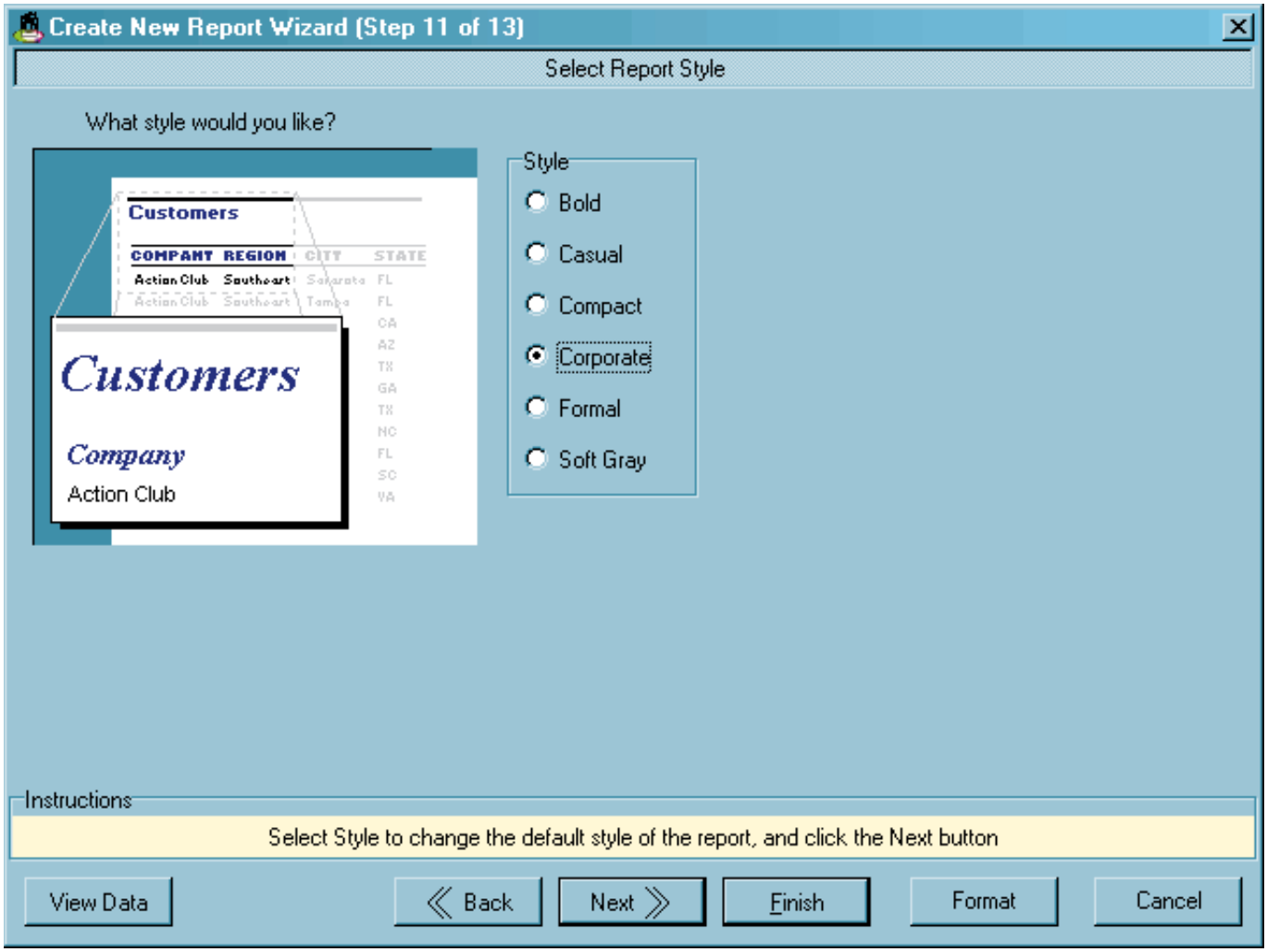


Step Eleven

In Step Eleven, select the style you want the report template to have.

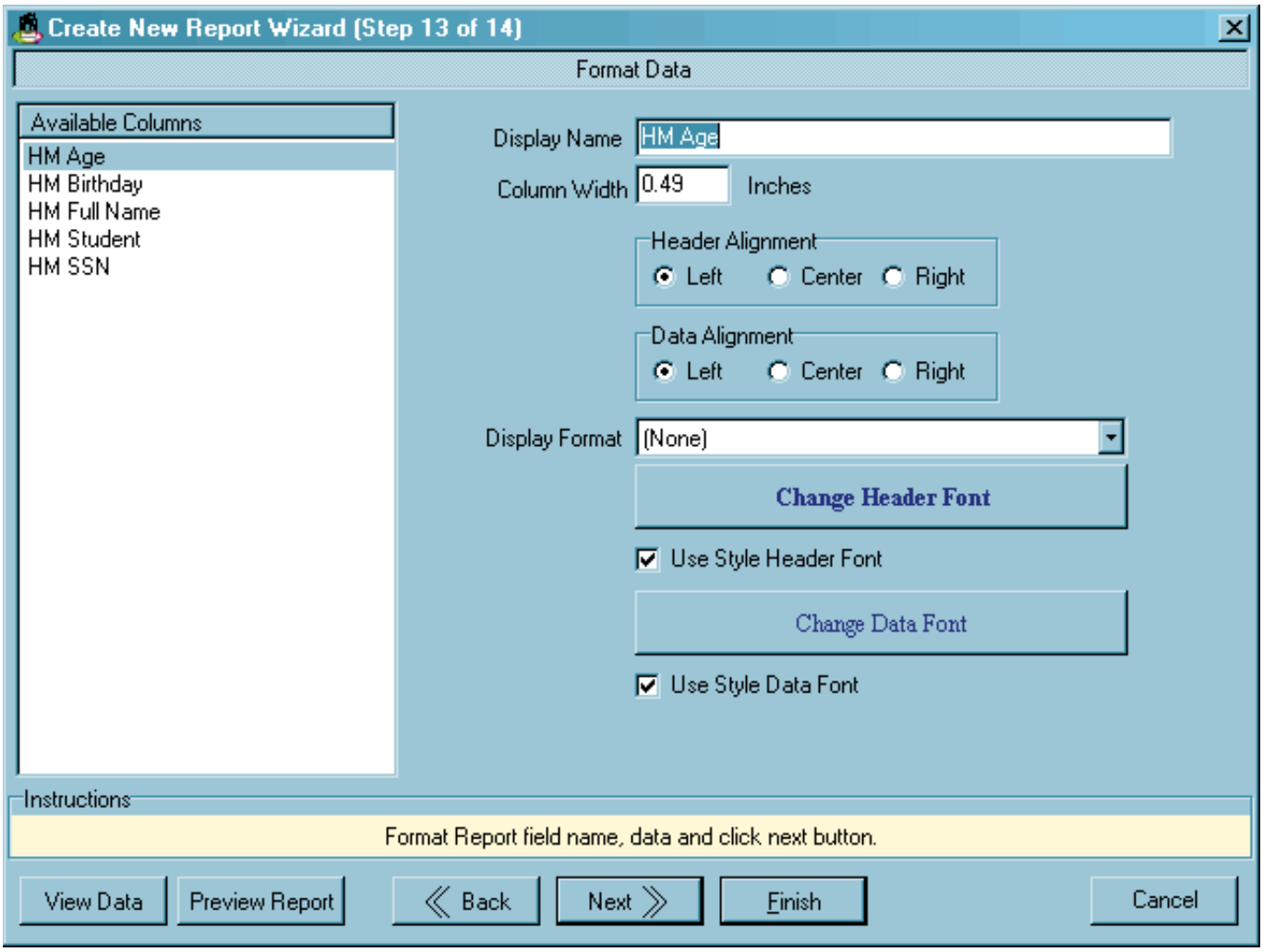
Use the Style set of radio buttons to select from the list of preformatted styles (colors and fonts) available in the program. The preview image at the left side of the screen changes to display a sample preview of your selected style.

When you have chosen your style option, click Next to proceed to Step Twelve.



Step Twelve

Step Twelve allows you to adjust the formatting of each data field that will appear on the finished report. The left side of the wizard contains a list of all data fields on the report, while the right side contains the formatting options for the currently selected field.



Display Name is the name that will appear in the column header over the selected data.

Column Width is the amount of horizontal space the column for the selected data will take up on the report.

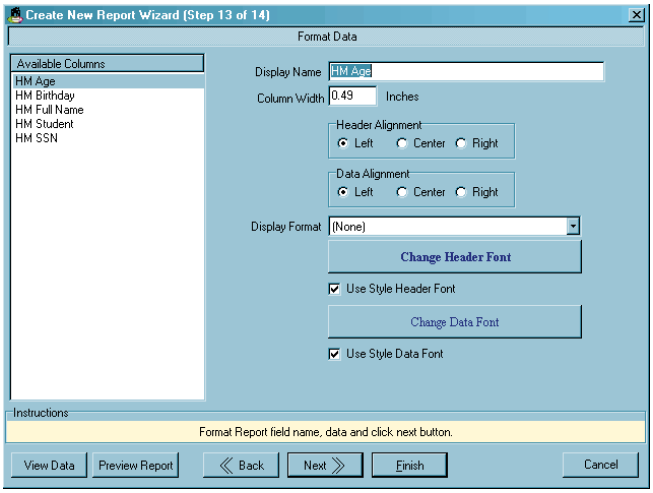
Header Alignment and Data Alignment are the alignment (justification) options that will be applied to the column header and the data in the column, respectively.

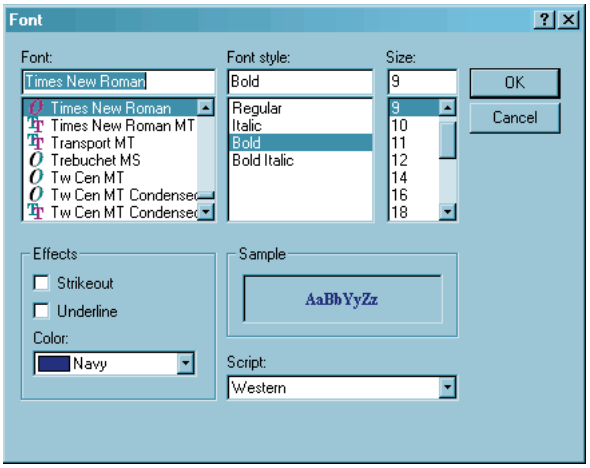
Display Format is an optional setting that allows you to format the selected data in a specific manner. The options available in this drop-down selection box change depending on whether the selected data is a date, a number, or a true/false value.

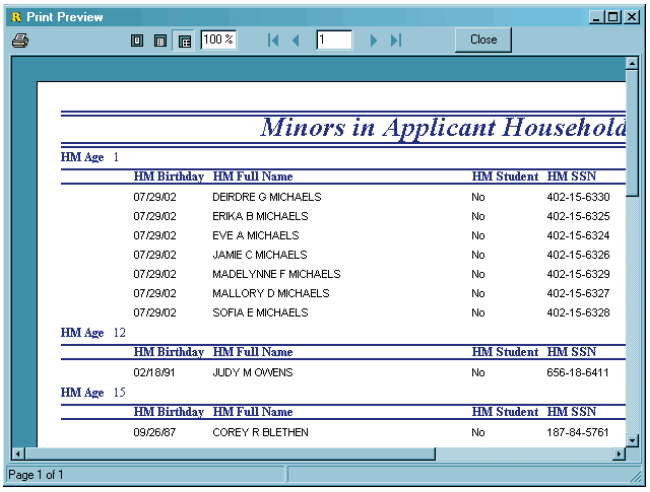
To change the font used in the header for the selected data, click the Change Header Font button. A standard Windows font formatting dialog box opens. Change the font as you see fit, then click OK. The font displayed on the Change Header Font button changes to preview your current choice. If you want to return to the default setting, check the Use Style Header Font box.

To change the font used in the column for the selected data, click the Change Data Font button. A standard Windows font formatting dialog box opens. Change the font as you see fit, then click OK. The font displayed on the Change Data Font button changes to preview your current choice. If you want to return to the default setting, check the Use Style Data Font box.

To preview the report with all of your current formatting options, click the Preview Report button. A standard WinTen print preview sub-screen opens. Review the report format presented on this sub-screen, then click the Close button to return to Step Thirteen.






Print Preview
100 %
1
Close
Minors in Applicant Household
HM Age 1
HM Birthday HM Full Name HM Student HM SSN
07/29/02 DEIRDRE G MICHAELS No 402-15-6330
07/29/02 ERIKA B MICHAELS No 402-15-6325
07/29/02 EVE A MICHAELS No 402-15-6324
07/29/02 JAMIE C MICHAELS No 402-15-6326
07/29/02 MADELYNNE F MICHAELS No 402-15-6329
07/29/02 MALLORY D MICHAELS No 402-15-6327
07/29/02 SOFIA E MICHAELS No 402-15-6328
HM Age 12
HM Birthday HM Full Name HM Student HM SSN
02/18/91 JUDY M OWENS No 656-18-6411
HM Age 15
HM Birthday HM Full Name HM Student HM SSN
09/26/87 COREY R BLETHEN No 187-84-5761
Page 1 of 1

When you are finished formatting the report, click Next to proceed to Step Thirteen.

Step Thirteen

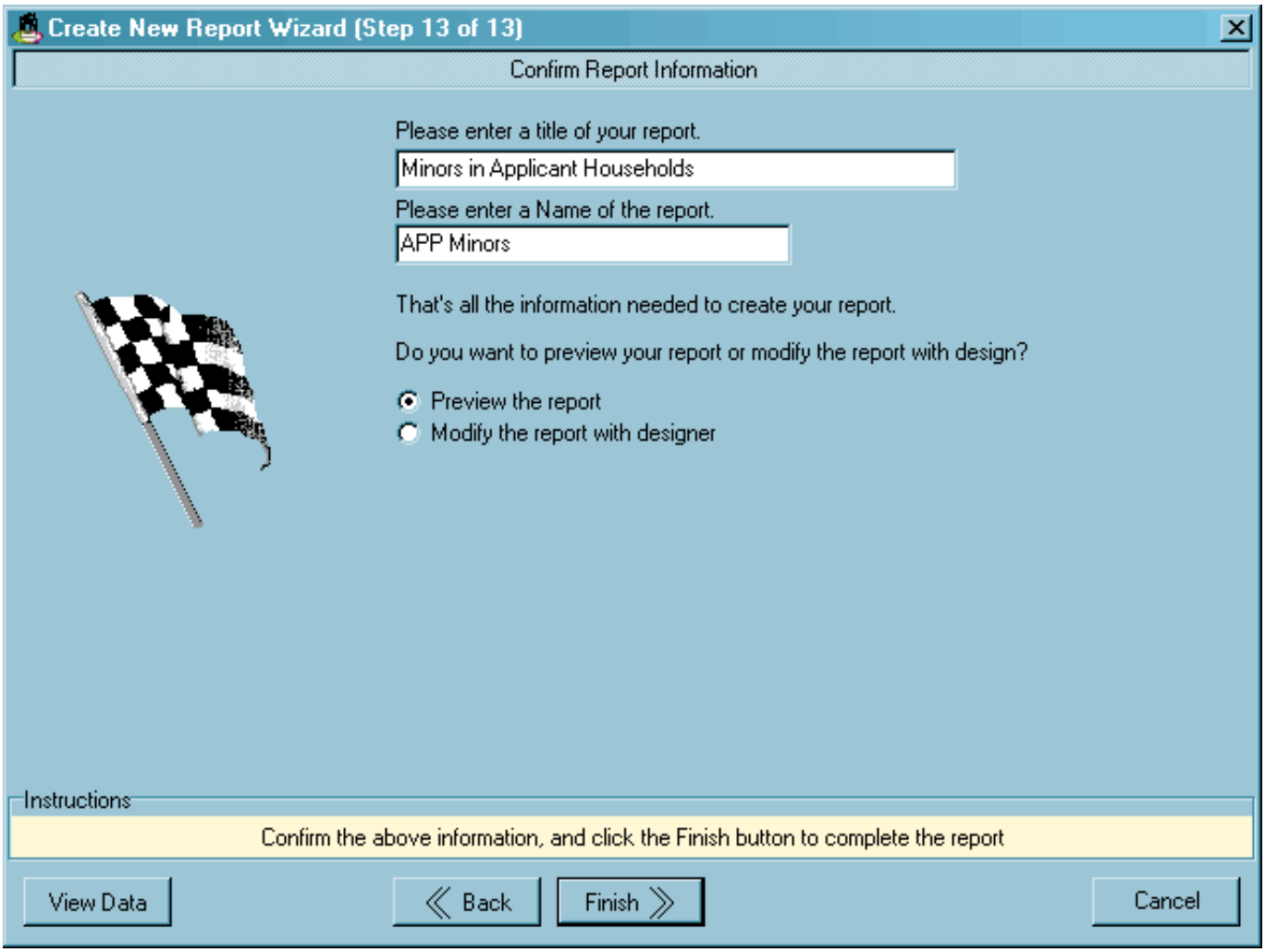
Step Thirteen provides the final options for your new report template.

In the first two data fields, enter the report's title and the name by which Report Writer should refer to it when placing it in lists of reports to select.

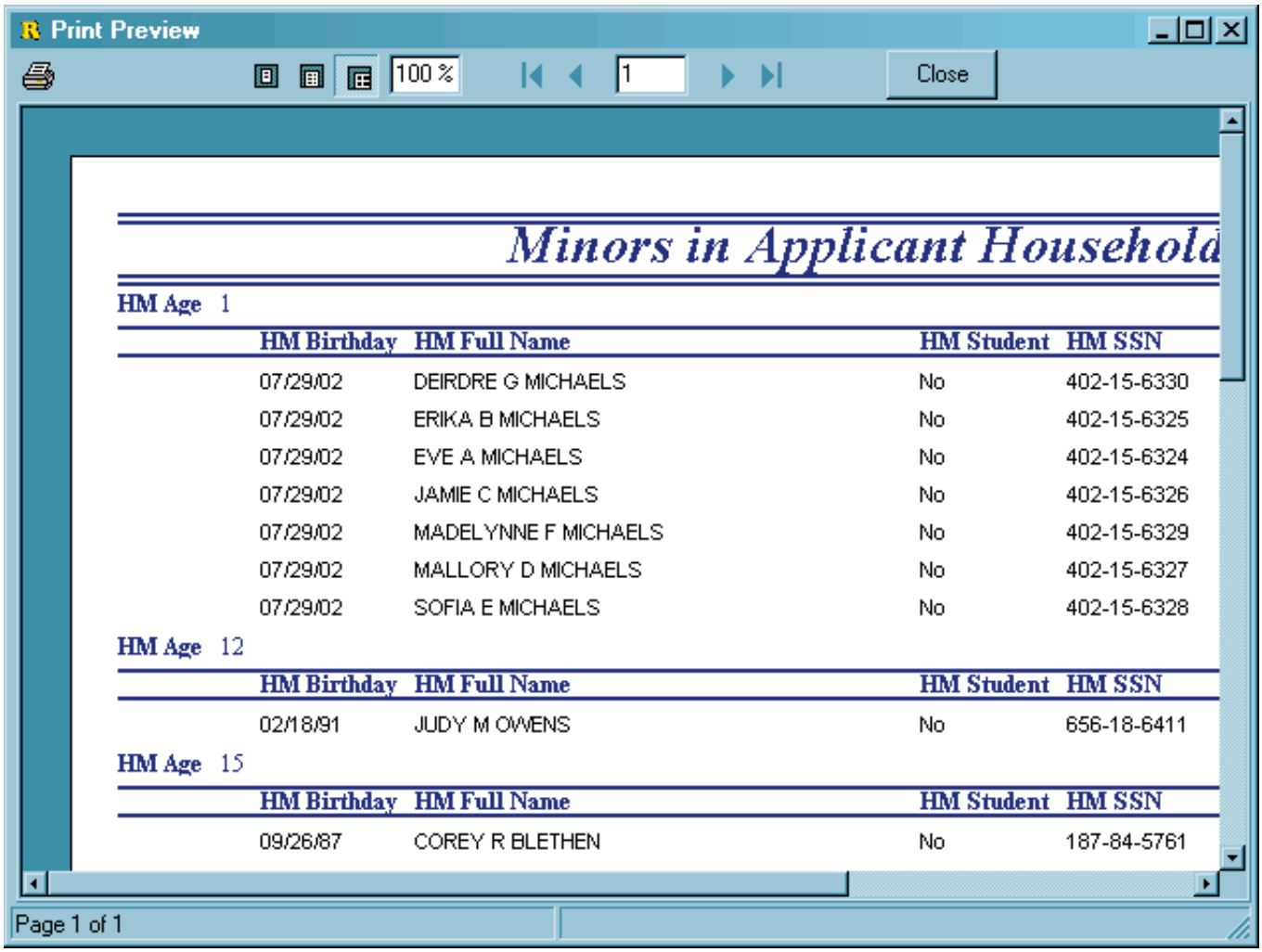
Select the "Preview the Report" radio button and click Next.

Hint: Advanced Users

Advanced users can select the "Modify the Report's Design" option. This enables you to adjust the report's layout and style manually. For details on this option, see the Advanced Report Creation chapter.


Create New Report Wizard (Step 13 of 13)
Confirm Report Information
Please enter a title of your report.
Minors in Applicant Households
Please enter a Name of the report.
APP Minors
That's all the information needed to create your report.
Do you want to preview your report or modify the report with design?
Preview the report
Modify the report with designer
Instructions
Confirm the above information, and click the Finish button to complete the report
View Data
Back
Finish
Cancel

A Print Preview screen opens with a preview of your new report template, filled with current data. Examine this preview, then click the Close button to complete the report template creation process and return to the Main Menu.


Print Preview
100 %
1
Close
Minors in Applicant Household
HM Age 1
HM Birthday HM Full Name HM Student HM SSN
07/29/02 DEIRDRE G MICHAELS No 402-15-6330
07/29/02 ERIKA B MICHAELS No 402-15-6325
07/29/02 EVE A MICHAELS No 402-15-6324
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07/29/02 MADELYNNE F MICHAELS No 402-15-6329
07/29/02 MALLORY D MICHAELS No 402-15-6327
07/29/02 SOFIA E MICHAELS No 402-15-6328
HM Age 12
HM Birthday HM Full Name HM Student HM SSN
02/18/91 JUDY M OWENS No 656-18-6411
HM Age 15
HM Birthday HM Full Name HM Student HM SSN
09/26/87 COREY R BLETHEN No 187-84-5761
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Advanced Report Creation and Editing

If you are comfortable with the basic process of creating a report template, several advanced options are available to you. These include advanced data source selection, advanced filtering, and user-defined calculated fields.

Advanced Data Source Selection

If you want to use advanced data source selection, during Step One of the Create New Report wizard, select the “Select Files with Data Dictionary” option and click Next. The wizard skips Step Two and proceeds to Step Three.

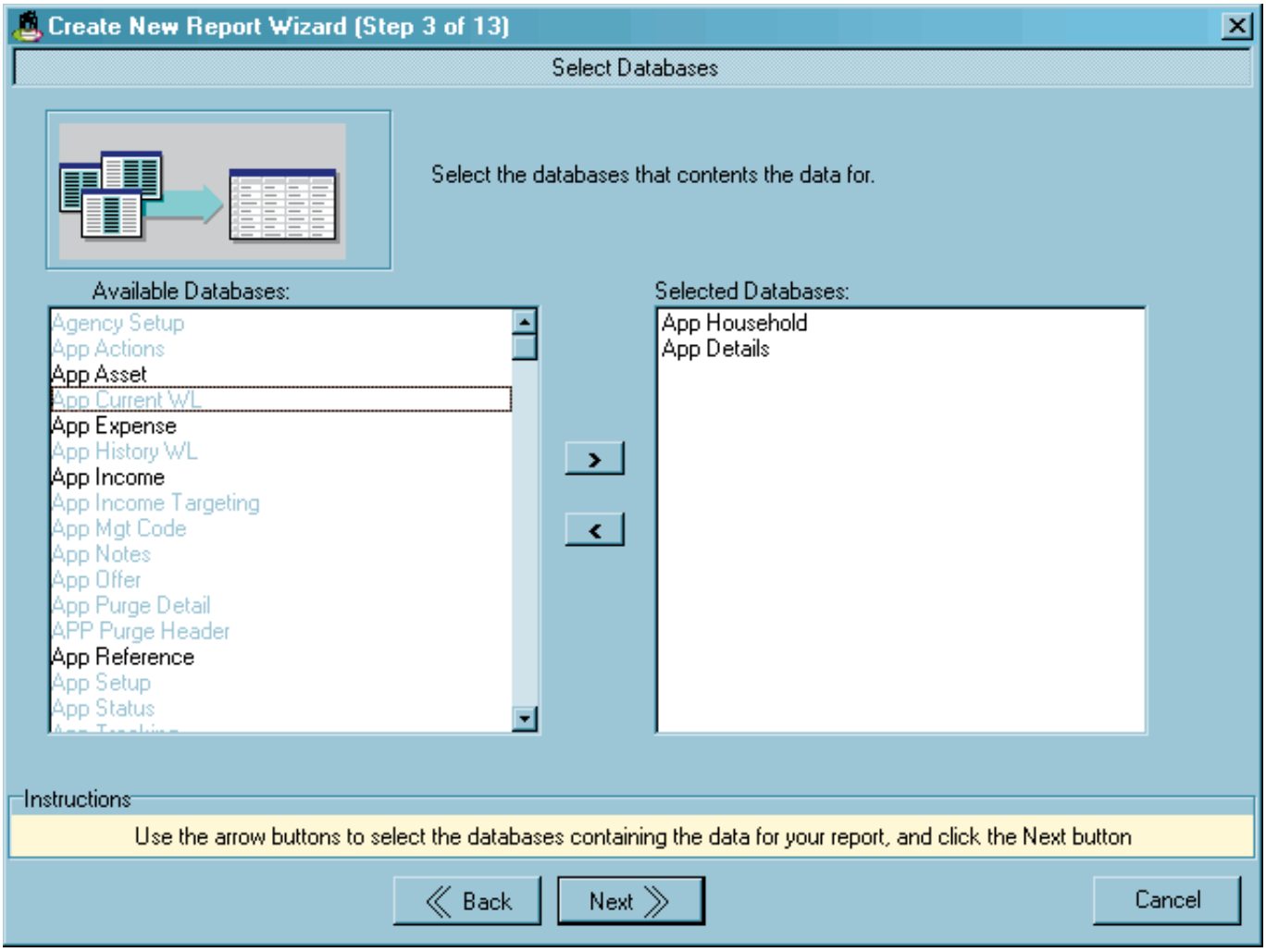
In Step Three of the wizard, select the individual tables (databases) from which you want to create the report.

The left side of the screen contains a list of every database in your WinTen system. The right side of the screen lists those databases that are currently selected for the report. To add a table, click on it in the Available Databases list and click the [>] button. To remove a database, click on it in the Selected Databases list and click the [<] button.

When you have selected all of the databases you want to use for the report, click Next to proceed to Step Four.

Hint: Selecting Multiple Tables

You can select multiple tables, as long as they all have at least one data field in common. When you select a table, every other table that does not have a data field in common with it becomes grayed out.



Advanced Filtering

When you set Step Eight of the Add New Report wizard to Advanced mode, the screen is divided into two halves. The table in the top half contains every data field you have selected to include in the report. The table in the bottom half contains the report's current filtering criteria. You can use the controls on this screen to set up complex logical statements for filtering the records that will be included in the report.

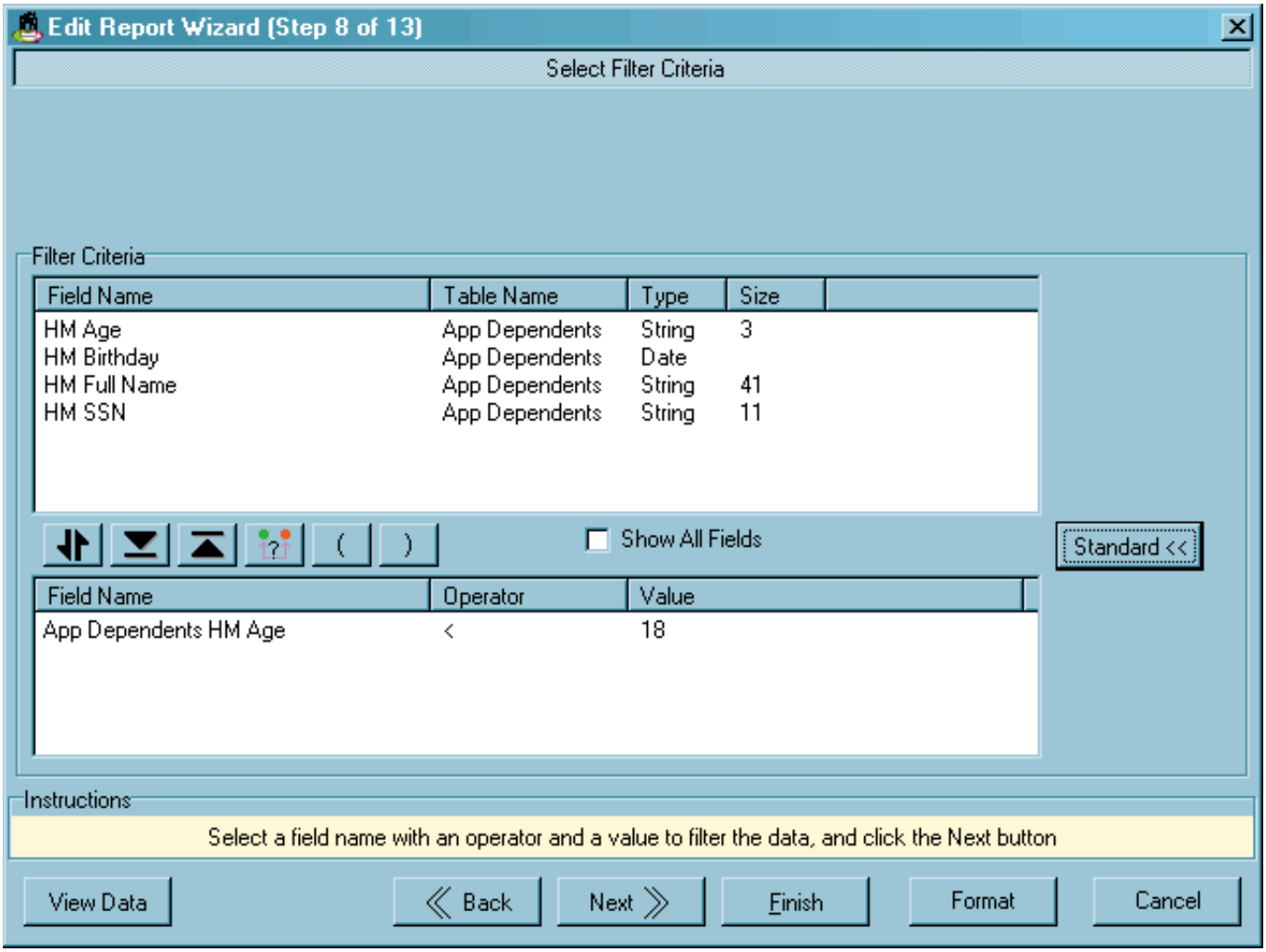
To add a logical statement using a specific data field, select that field in the top table and click the Add Field (down-arrow) button.

To remove a logical statement from the report's filtering scheme, select it in the bottom table and click the Remove Field (up-arrow) button.

Hint: "View Results"

At Step Four or any subsequent step, you can click the View Result button in the lower left corner of the wizard to open the SQL Preview sub-screen. This sub-screen displays a table of all of the data that will appear on the report if you create the report template with your current selections.

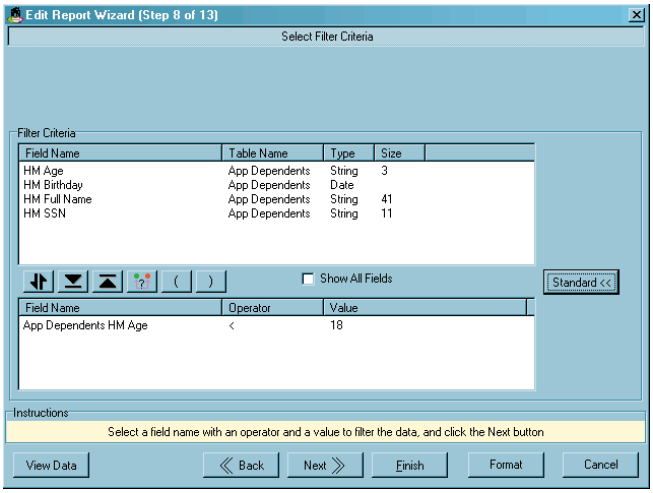
This feature is particularly important in Step Seven, because it enables you to check the data you will receive with your current filter selection, which can tell you if your filters are too restrictive or not restrictive enough.



Editing a Logical Statement

When you first add a logical statement to the report's filtering scheme, it is incomplete. To complete it, you must select a logical operator and enter the value against which to filter.

The available logical operators are equal to (=), not equal to (<>), less than (<), less than or equal to (<=), greater than or equal to (>=), greater than (>), and "between."



Using "Between"

If you want to filter for all records between a pair of values, separate the two values with a comma. For example, if you want all tenants between the ages of 30 and 40, use the "between" filter for age and enter "30,40" in the Value field.

Using the AND Condition

If you have multiple logical statements, AND is the default condition. You do not have to do anything to specify AND.

Using the OR Condition

To add an OR condition between two logical statements, select the second one and click the OR button. The program inserts a new line with an "OR."

Using Parentheses

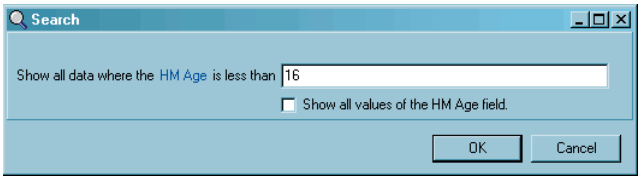
To add an open parenthesis, select the filter field before which you want to place it and click the [(] button.

To add a closed parenthesis, select the filter field after which you want to place it and click the [)] button.

To remove a parenthesis, select it and click the Remove Field (up-arrow) button.

Using User-Defined Values

Normally, you will set a report filter to use the same values for filtering at all times. However, you may need to allow users to enter their own values for filtering. For example, you may create a report intended for one month's data, allowing users to specify their own date ranges. In such a case, you can set a user-defined value for a filter. To do this, enter a colon and a label for the data that the user will enter (e.g. ":age"). If you are using the "between" logical operator, enter a colon, the label for the first value, a comma, and the label for the second value ("e.g. ":age1,age2"). When a user runs this report, the program will prompt him for this data, as shown at right, and filter the report according to the value he enters.

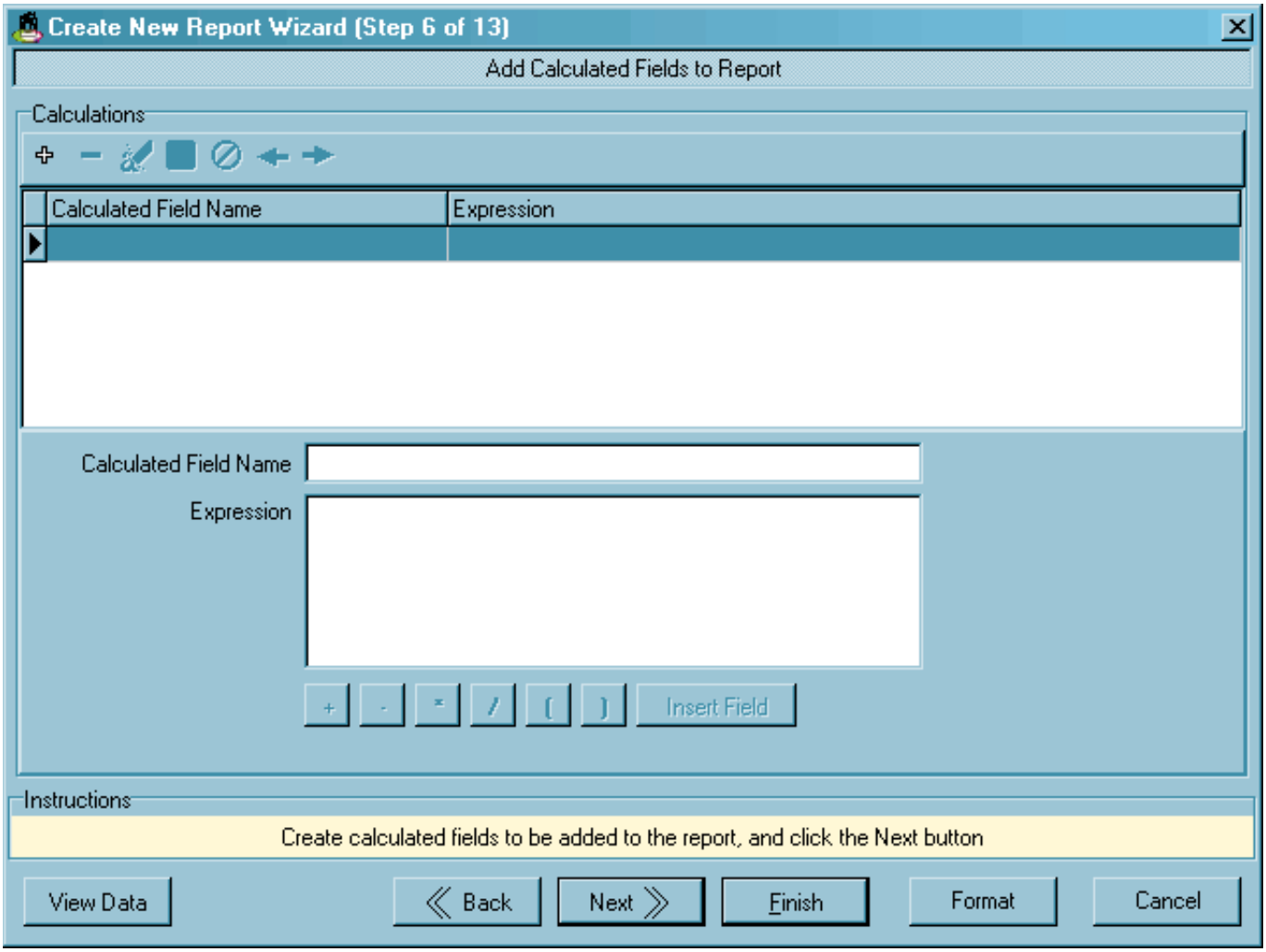


Caution

Only one filter on a report can use a user-defined value.

Creating Calculated Data Fields

Calculated data fields are data fields that are not in any database in your Tenmast system, but can be generated using the data that your system does have. For example, you can have a calculated field that is the total number of children and elderly members in each applicant household, or one that shows 40% of each household's total income. You can add calculated fields to a report template on Step Six of the Create New Report Wizard:



A calculated field uses basic mathematical functions and the names of the data fields that are used to generate it. You can add, subtract, multiply, divide, and use parentheses to create more complex algebraic expressions.

Adding a New Calculated Field

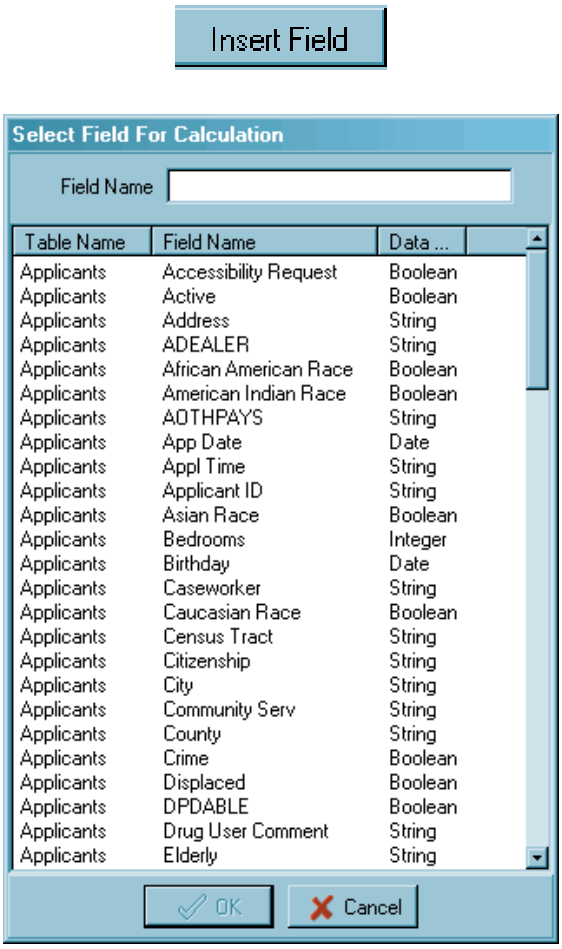
When you first enter Step Six of the wizard, it contains no calculated data fields. To add a field, click the Add toolbar button. The wizard enters edit mode.

Enter the name of the calculated field in the Calculated Field Name data field. This is the name that will appear in the column heading for this field on the finished report. You can now add data fields, mathematical operators, and parentheses to create your calculation.

Adding Data Field Names

The Expression data entry area is where you create the mathematical calculation that will generate values for your calculated field. You could type out the names of the data fields that you want to use… but this would be difficult, as Report Writer only recognizes the internal names that those data fields go by in the database, and those are hard to remember and type out correctly if you aren't a programmer.

Fortunately, there is an easier way to add a data field name to your calculation: click in the Expression data entry area to put the cursor where you want to put the data field, then click the Insert Field button. This opens the Select Field for Calculation dialog box. Click on the data field that you want to add to the calculation, then click the OK button. The program inserts the data field into the calculation.



Adding Mathematical Operators

Just having data field names in your calculation doesn't do you much good, though. You also need mathematical operators – addition, subtraction, multiplication and division – to do something with those values. To insert a mathematical operator, click in the Expression data entry area to put the cursor where you want to put the data field, then click the appropriate operator's button (see right).

Adding Parentheses

You can also add parentheses to your calculation to tell the program the order in which it should perform all of the mathematical operations. Report Writer follows standard order of operation rules: anything in parentheses is calculated first, then all multiplication and division are performed (left to right), and finally all addition and subtraction are performed (again, left to right).

For example, if, you have two numbers that you want added before dividing the sum by a third number, you might write them on paper like this:

A + B / C

You'd probably know what you meant. The program, however, follows rules instead of intuition, and doesn't know anything you don't specifically tell it. It would first divide B by C, then add the result to A. To get the program to do things in the order you want, you'd need to put the addition of A and B in parentheses, like this:

(A + B) / C

This will ensure that the program first adds A and B, then divides the result by C.

To add an open parenthesis or closed parenthesis to a calculation, click in the Expression data entry area to put the cursor where you want to put the data field, then click the appropriate parenthesis' button (see right).

Examples

The following examples illustrate some of the common things you can do with a calculated field.

Add Two Numeric Data fields

[first data field] + [second data field]

For instance, if you want to add the number of minors in an applicant household to the number of elderly members of the same applicant household, the calculation looks like:

APPLICNT.MINORS+APPLICNT.ELDERLY

Subtract One Numeric Data Field from Another

[first data field] – [second data field]

For instance, if you want to subtract the number of minors in an applicant household from the number of members of the same applicant household, the calculation looks like:

APPLICNT.HSHLDSIZE-APPLICNT.MINORS

Multiply a Numeric Data Field by a Constant Number

[data field] * [number]

For instance, if you want to multiply a tenant household's monthly rent by 12 to get that household's annual rent, the calculation looks like:

F58.BASERENT*12

Divide a Numeric Data Field by a Constant Number

[data field] / [number]

For instance, if you want to divide a tenant household's total income by 40, the calculation looks like:

F58.TOTINCM/40

Average Multiple Data Fields

([first data field] + [second data field] + … + [last data field]) / number of data fields.

For instance, if you want the average of a tenant household's work order charge, electricity charge, and rent charge, the calculation looks like:

(TENMAST.SERVICES+TENMAST.ELEOVERAGE+TENMAST.RENTCHG) / 3

Add Multiple "String" Data Fields into a Single Field

[first data field] + [second data field] + [third data field]

A "string" data field is a data field that contains text rather than a number. You can add individual string-type data fields together to make a longer one. For instance, if you want a single data field that shows a household's city, state, and zip code, the calculation looks like:

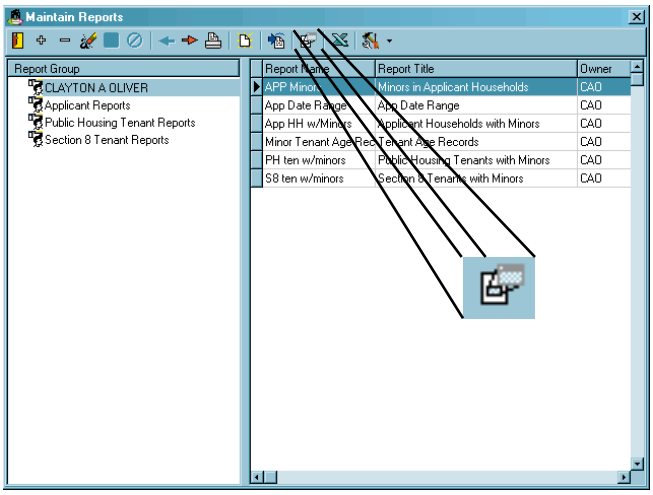
F58.CITY+F58.ST+F58.ZIP

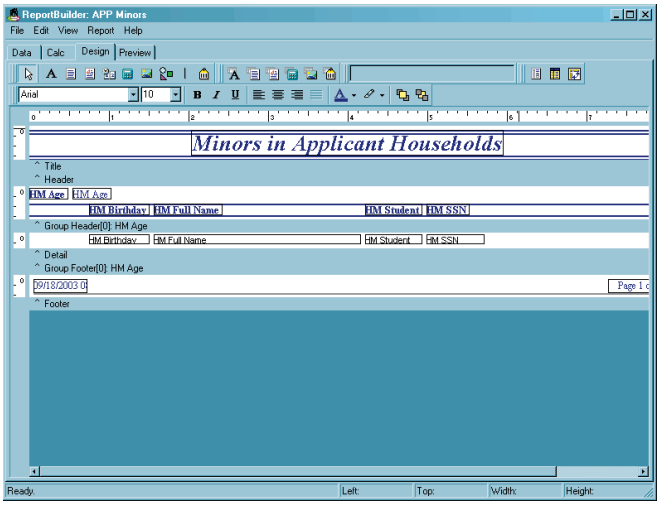
You can also add text to a string data field by enclosing it within single quote marks and including it in the calculation with another addition sign. For instance, if you want a comma and space after the tenant's city and two spaces after the zip code, the calculation looks like:

F58.CITY+', '+F58.ST+' '+F58.ZIP

Editing a Report Template in ReportBuilder

The Report Writer program is built around an independent component called ReportBuilder, which Tenmast purchased from another software vendor to speed our development of Report Writer. ReportBuilder is an extensive and powerful report design tool that enables the user to control all aspects of a report template, from the structure of the database queries to the precise appearance of the report's layout.





Caution

ReportBuilder is recommended only for those clients who have experience with Microsoft Access or a similar relational database reporting system and who feel comfortable getting "under the hood" of Report Writer. Due to ReportBuilder's complexity and the limits of our Training and Support Department's resources, Tenmast does not offer support for this feature.

ReportBuilder adds additional data to a report template which the Edit Existing Report wizard cannot interpret. ***Once you have edited a report template in ReportBuilder, you are unable to edit it through the wizard****. This is a safety feature to prevent program crashes.*

If you want copies of the original manufacturer's manuals for ReportBuilder, or would like us to use ReportBuilder to create a custom report for you, please contact our Training & Support Department.

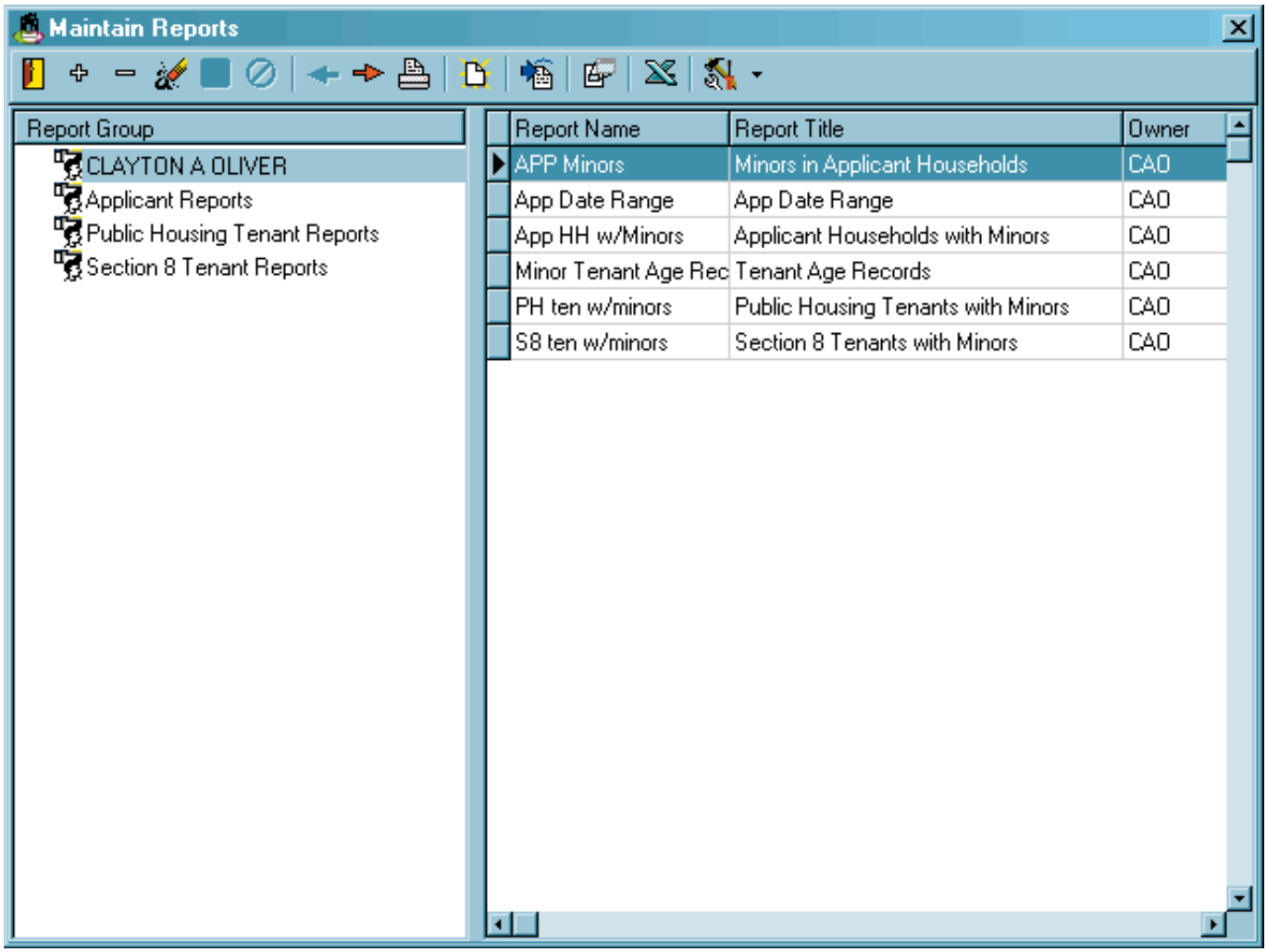
Running a Report

The core purpose of Report Writer is to enable you to create new reports and run them as needed. This chapter addresses the basic procedure for running a report for which you already have a report template.

To begin this process, click the Reports button or press <R> at the Main Menu. This opens the Maintain Reports screen.

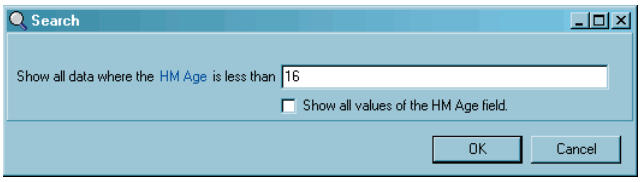
Maintain Reports Screen

The Maintain Reports screen enables you to select any report to which you have access. The screen is composed of a pair of tables. The left table lists all report groups to which you have access. The right table lists all reports in the selected report group. Most of the functions on this screen deal with report management and are discussed in the Managing Reports chapter of this manual.

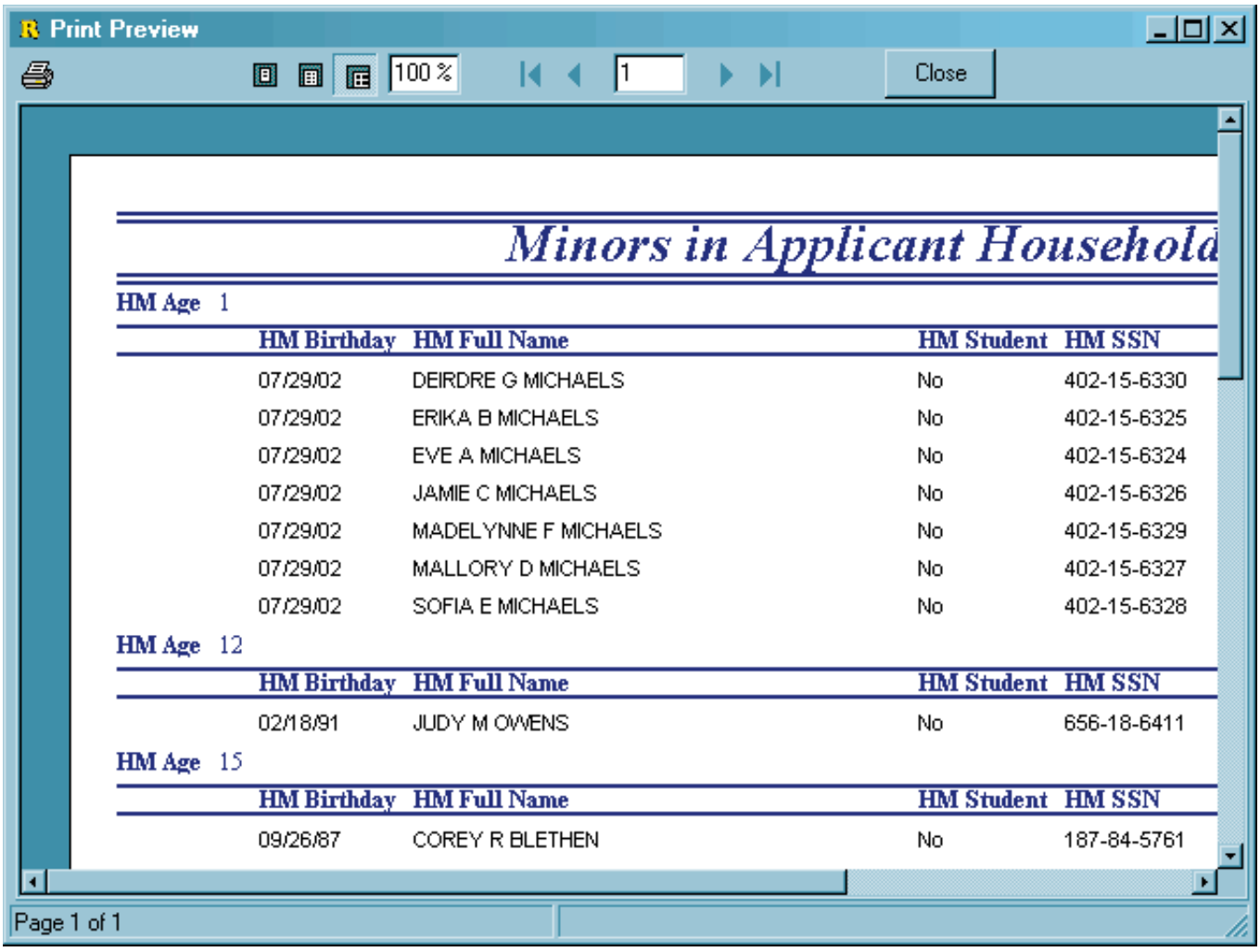


To run a report, select the report group to which it belongs, select the report itself, and click the Print Preview button.

If the report template is set up to allow you to filter the report using a user-defined value, a Search dialog box opens for you to enter the filtering values.



A standard Print Preview dialog box opens with the report. Review the report using the standard print preview screen controls. If you want to print it, click the Print button. When you are done, click the Close button to return to the Maintain Reports screen.


Print Preview
100 %
1
Close
Minors in Applicant Household
HM Age 1
HM Birthday HM Full Name HM Student HM SSN
07/29/02 DEIRDRE G MICHAELS No 402-15-6330
07/29/02 ERIKA B MICHAELS No 402-15-6325
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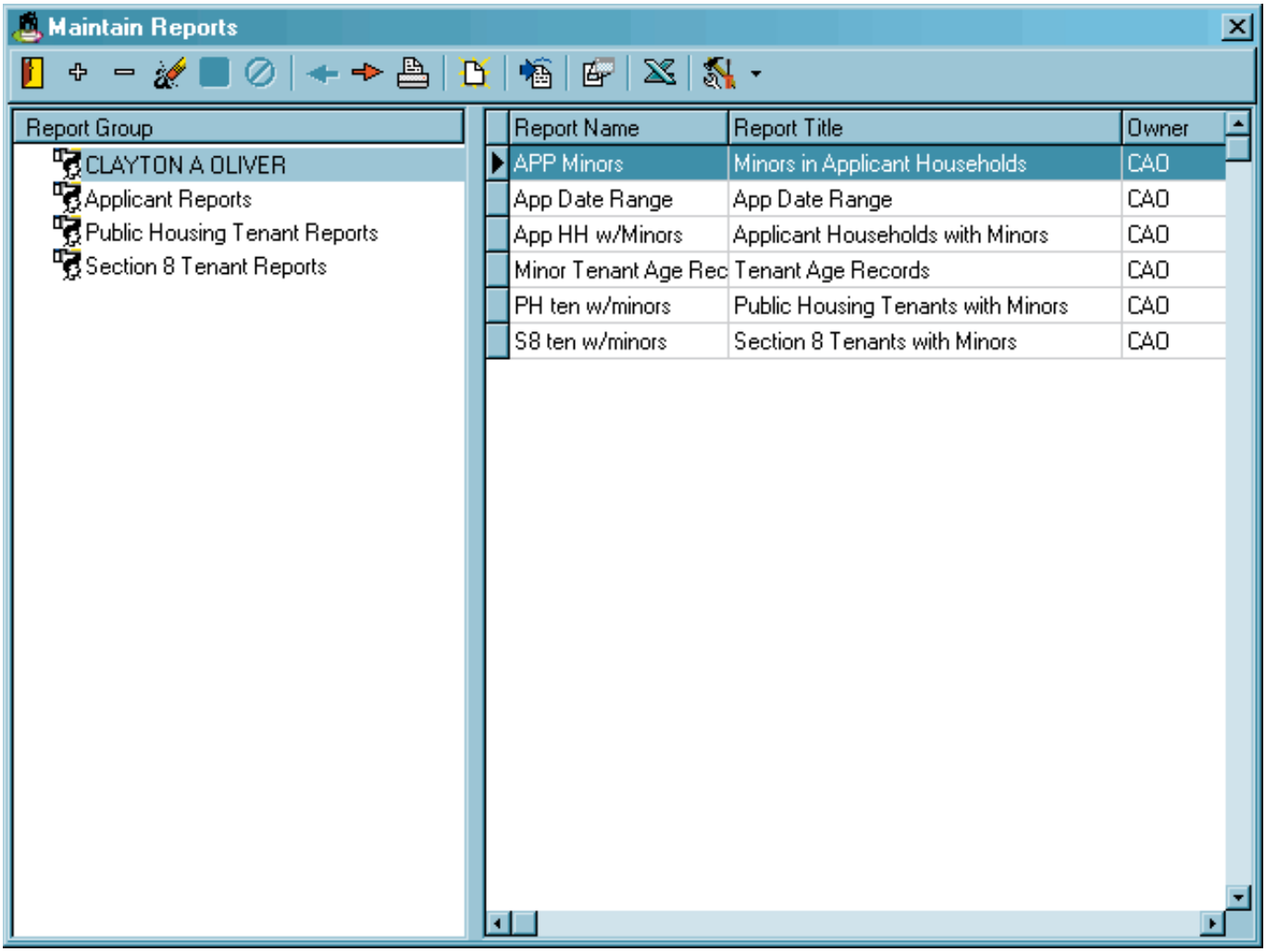
07/29/02 SOFIA E MICHAELS No 402-15-6328
HM Age 12
HM Birthday HM Full Name HM Student HM SSN
02/18/91 JUDY M OWENS No 656-18-6411
HM Age 15
HM Birthday HM Full Name HM Student HM SSN
09/26/87 COREY R BLETHEN No 187-84-5761
Page 1 of 1

Managing Reports

Custom Report Writer includes several functions which allow you to manage the reports you have created in the program. These include importing, exporting, group assignment, and editing. To use these functions, click the Reports button or press <R> from the Main Menu. This opens the Maintain Reports screen.

Maintain Reports Screen

The Maintain Reports screen enables you to select any report to which you have access. The screen is composed of a pair of tables. The left table lists all report groups to which you have access. The right table lists all reports in the selected report group.



Hint: The Red Zone

If you do not have supervisor-level access, report templates which you did not create show up in this table in red. You cannot edit or change the report group of a template that you did not create.

Editing a Report Template

To edit an existing report template, select the report and click the Edit button. This opens the Edit Existing Report wizard on Step Four.

The Edit Existing Report wizard is identical to the Add New Report wizard in every step, except that you cannot back up to Step One, Two, or Three. Use the Back and Next buttons to move forward or back through the wizard to the step whose data you need to change, then proceed through the wizard to Step Fourteen and finish the report. When you complete the wizard, all changes you made in the wizard are saved.

Hint: Why can't I edit this report?

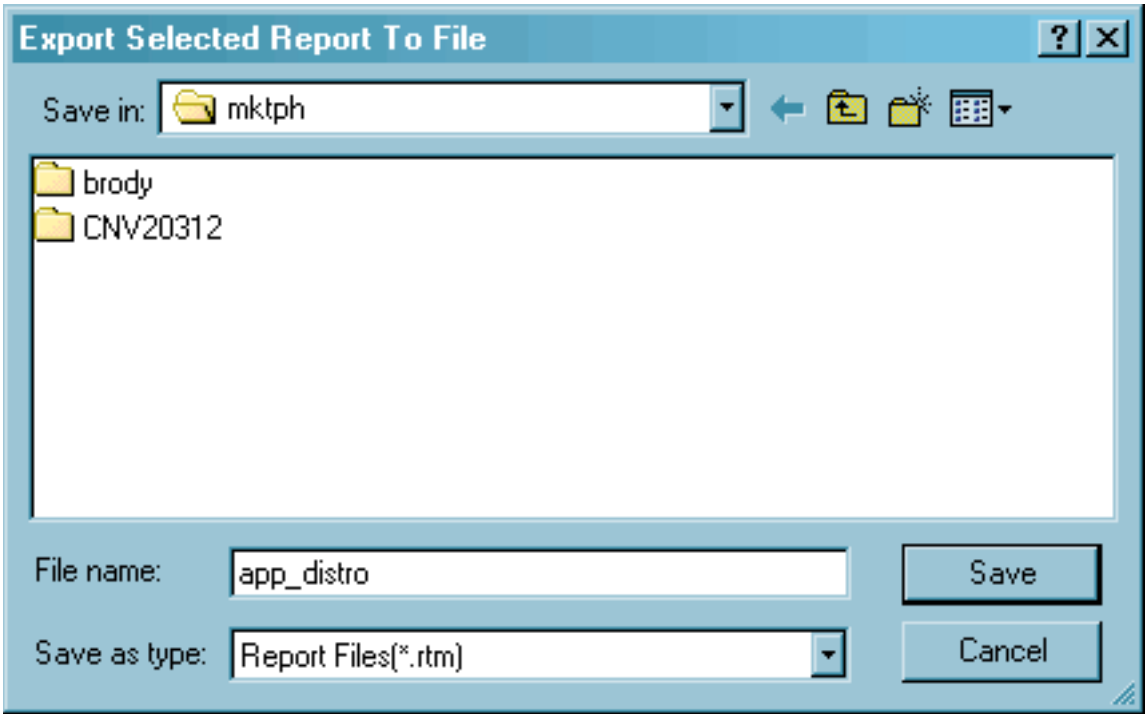
If you are not the owner of a report (e.g. you didn't create it and you don't have supervisor-level access), you cannot edit or delete a report template or change its report group assignment.

Exporting a Report Template to a Template File

Custom Report Writer can export report templates to external data files. You can send these templates to other users in your office who want to use them, or to Tenmast for assistance with formatting.

To export a report, select it, then select the Export Report option from the Other Functions menu. This opens the Export Selected Report to File dialog box.

The Export Selected Report to File dialog box is a standard Windows file selection dialog box. Navigate to the location on your system in which you want to store the export file, enter the name under which to save it, and click Save.

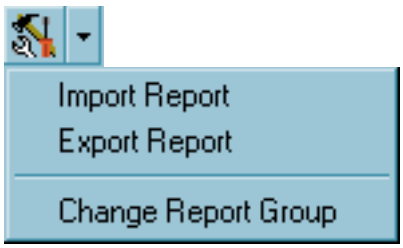


The program saves the report as a .RTM file under the selected file name. When the process is complete, a dialog box opens to inform you of this fact. Click OK to return to the Maintain Reports screen.

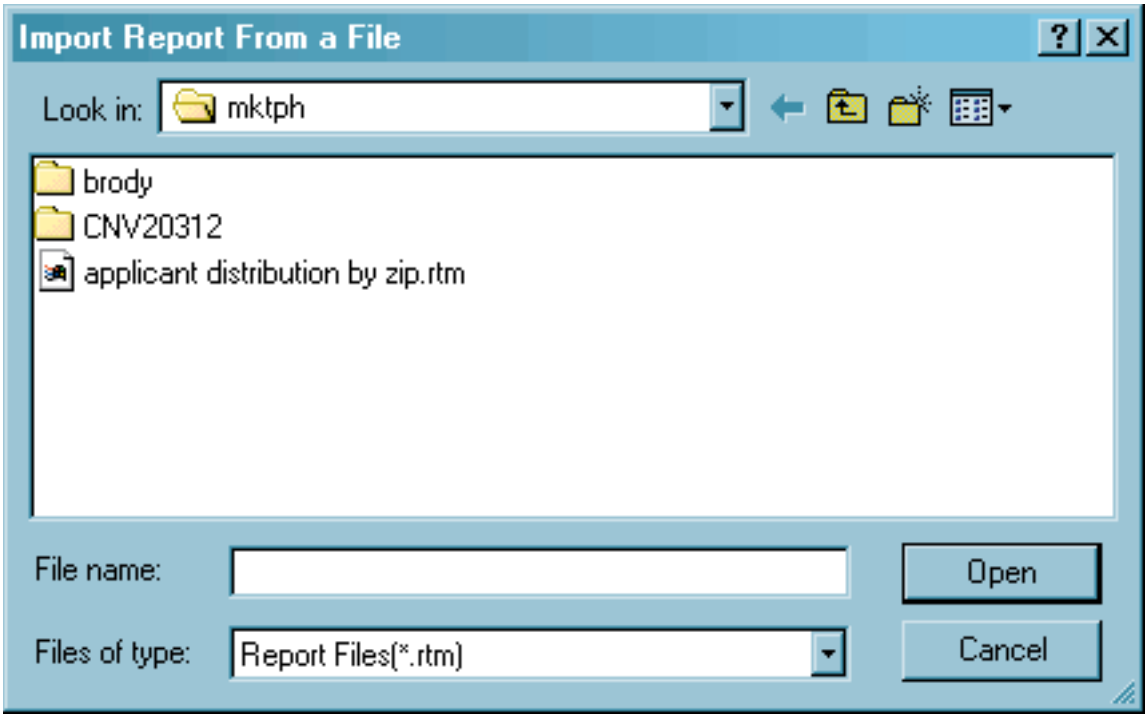
Importing a Report Template from a Template File

If another user has exported a report template and you know where the report file is on your system, you can import it into your own report groups. You can also import reports that Tenmast has created and emailed to you, if you have saved them on your system.

To import a report template, select the report group into which you want to place the report you are importing. Then select the Import Report option from the Other Functions menu. This opens the Import Report from a File dialog box.



The Import Report from a File dialog box is a standard Windows file selection dialog box. Navigate to the location on your system in which the report file is stored, then select it and click Open.

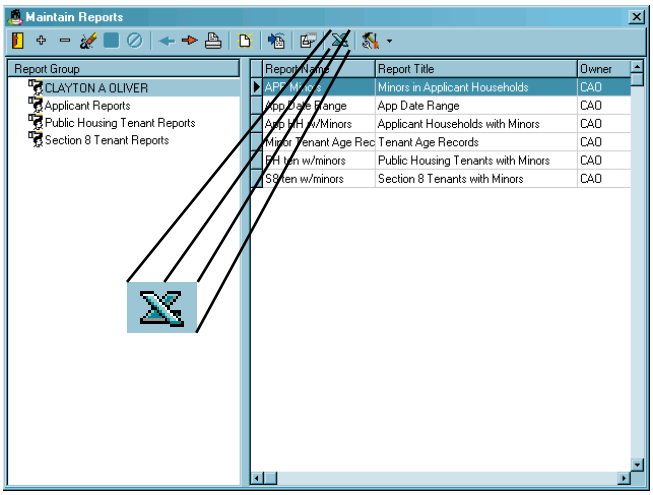


The program imports the report into the selected report group. When the process is complete, a dialog box opens to inform you of this fact. Click OK to return to the Maintain Reports screen.

Exporting Report Data to an Excel File

If you use Microsoft Excel to work with spreadsheets, you may eventually find yourself wishing for a way to get your hands on the “raw” data from a report in an Excel (.XLS) file. Report Writer enables you to do this, using the Export to Excel function.

From the Maintain Reports screen, select the report whose data you want in Excel format and click the Export to Excel button.

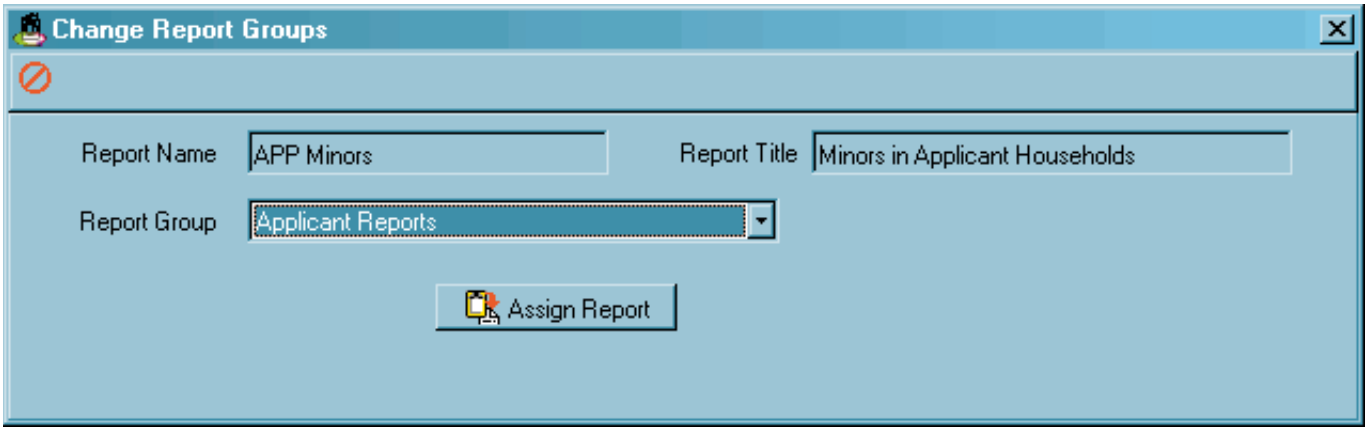


A standard Windows file save dialog box opens. Select the location to which to save the file and the name under which to save it and click OK. You can now open that file with Microsoft Excel.

Changing a Report's Assigned Group

To change the report group to which a report is assigned, select the report, then select the Change Report Group option from the Other Functions menu. This opens the Change Report Group dialog box.

In the Change Report Group dialog box, select the report group to which you want to assign the report and click the Assign Report button.



Creating a New Report Template

To create a new report template, click the Add button. This starts the Create New Report wizard. For more information on this wizard, see the Adding a New Report Template and Advanced Report Creation chapters of this manual.

Deleting a Report Template

To delete a report template, select it and click the Delete button.

A standard confirmation dialog box opens to confirm that you intend to delete the selected report. Click Yes to delete the report or No to cancel.

Index Databases

This function rebuilds the indexes that Report Writer uses to search for specific records within its databases. Index file are similar to a library's card catalog — they tell the computer the location of the data for which you are searching. Indexing databases is safe to do at any time — it does not need to be done at a specific time of the month or the year. To initiate the reindexing process, click the Reindex button or press <I> at the Main Menu.

When to Reindex

Occasionally, index files can become corrupted. This means that such a file's data is no longer complete, and it may not be in a form that Report Writer can read. The most common indicator of a corrupted index file comes when you search for a record that you know is present and the program does not find it. Reindexing solves this problem by going through each database and rebuilding the index file for it.

CAUTION

You must make sure that no one else is using Report Writer before using this feature. Reindexing rewrites files, which can cause damage to the data within those files if they are already open when Rent Reasonableness attempts to index them.

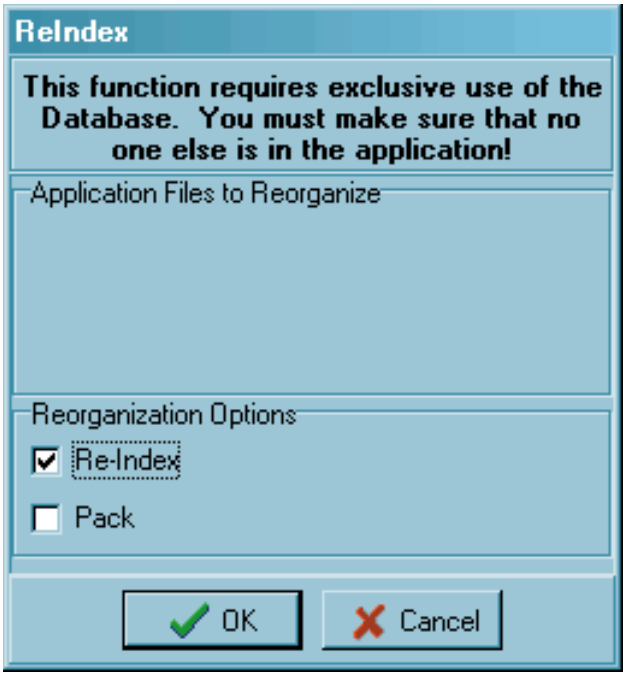
When to Pack

While you are reindexing, you also have the option to pack Report Writer's databases. Packing is a process by which the program removes all blank or deleted entries from its databases, thereby reducing the size of the files.

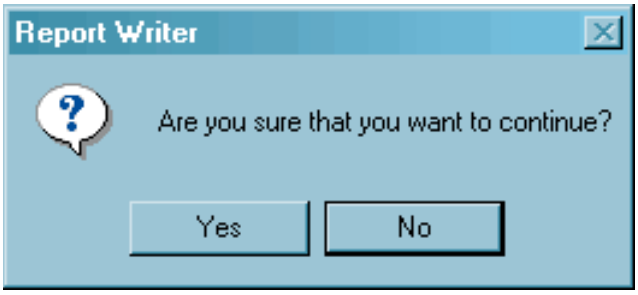
CAUTION

Tenmast recommends that you do not perform packing unless specifically instructed to do so by Tenmast Training & Support personnel. Packing permanently removes deleted records. Once you have packed, data that the packing process erases will be irrevocably gone.

When you start the reindexing process, the Reindex dialog box opens. Check the boxes that correspond to the options you want to apply to the process (reindex and/or pack) and click OK.



A standard confirmation dialog box opens. Click Yes to continue or No to cancel.



If you click Yes, the reindexing process begins. A dialog box opens which shows the process' progress. When reindexing is complete, all associated dialog boxes close and the program returns to the Main Menu.